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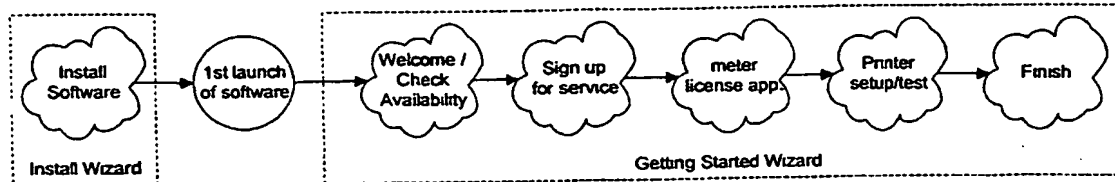
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(54) Title: ONLINE VALUE BEARING ITEM PRINTING



(57) Abstract: An on-line VBI printing system that includes one or more cryptographic modules and a central database. The cryptographic modules are capable of implementing a variety of required security standards. A client system provides a user friendly GUI for facilitating the interface of the user to the system. The GUI system includes wizards that help the user step-by-step with processes of installation, registration, and printing. In one aspect, the invention describes an on-line system for printing a value bearing item (VBI) that includes a client system for interfacing with a user comprising: a GUI for installing software for printing the VBI; a GUI for 8 registering the user in the system; and a GUI for managing the printing of the VBI 88; and a server system capable of communicating with the client system over a computer network for authorizing the client system to print the VBI.

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ONLINE VALUE BEARING ITEM PRINTING

FIELD OF THE INVENTION

The present invention relates to secure printing of value-bearing items (VBI) preferably, postage. More specifically, the invention relates to a graphical user interface (GUI) for printing of VBI in a computer network environment.

BACKGROUND OF THE INVENTION

A significant percentage of the United States Postal Service (USPS) revenue is from metered postage. Metered postage is generated by utilizing postage meters that print a special mark, also known as postal indicia, on mail pieces. Generally, printing postage and any VBI can be carried out by using mechanical meters or computer-based systems.

With respect to computer-based postage processing systems, the USPS under the Information-Based Indicia Program (IBIP) has published specifications for IBIP postage meters that identify a special purpose hardware device, known as a Postal Security Device (PSD) that is generally located at a user's site. The PSD, in conjunction with the user's personal computer and printer, functions as the IBIP postage meter. The USPS has published a number of documents describing the PSD specifications, the indicia specifications and other related and relevant information. There are also security standards for printing other types of VBI, such as coupons, tickets, gift certificates, currency, voucher and the like.

A significant drawback of existing hardware-based systems is that a new PSD must be locally provided to each new user, which involves significant cost. Furthermore, if the additional PSD breaks down, service calls must be made to the user location. In light of the drawbacks in hardware-based postage metering systems, a software-based system has been developed that does not require specialized hardware for each user. The software-based system meets the IBIP specifications for a PSD, using a centralized server-based implementation of PSDs utilizing one or more cryptographic modules. The system also includes a database for all users' information. The software-based system, however, has brought about new challenges.

The software-based system should be able to handle secure communications between users and the database. The system should also be user friendly and be able to provide the user with a step-by-step process for installing the client software, registering with the system, printing the postage value, maintaining and monitoring the user account information, and the like.

Therefore, there is a need for a new method and apparatus for implementation of VBI printing via a user friendly GUI with a variety of selectable options.

SUMMARY OF THE INVENTION

In accordance with one aspect of the present invention, an on-line VBI printing system that includes one or more cryptographic modules and a central database has been designed. The

1 cryptographic modules serve the function of the PSDs and are capable of implementing a variety of required security standards. A client system provides a user friendly GUI for facilitating the interface of the user to the system. The GUI system includes wizards that help the user step-by-step with processes of installation, registration, and printing

5 In one aspect, the invention describes an on-line system for printing a value bearing item (VBI) that includes a client system for interfacing with a user comprising; a GUI for installing software for printing the VBI; a GUI for registering the user in the system; and a GUI for managing the printing of the VBI; and a server system capable of communicating with the client system over a computer network for authorizing the client system to print the VBI.

10 Other features of the present invention include a GUI for making changes to the user's information; a GUI for displaying the user information including an account information, wherein the account information includes an amount of credit left in the account; a GUI for specifying an address book so that the system can use the address book to print addresses; and a GUI for entering a password so that the server system can store the entered password and verify the password. In one embodiment, the server system includes an address matching module for verifying an address entered by the user.

15 In another aspect, the invention describes a method for printing a value bearing item (VBI) over a computer network having a client system and a server system comprising the steps of: displaying a first GUI by the client system for registering a user with the server system over the computer network; establishing communication with the server via the network; entering user information in the first GUI; communicating the entered user information to the server; displaying a second GUI by the client system including printing options for managing the printing of the VBI; selecting one or more printing options from the second GUI; and printing the VBI according to the selected one or more printing options.

25 BRIEF DESCRIPTION OF THE DRAWINGS

The objects, advantages and features of this invention will become more apparent from a consideration of the following detailed description and the drawings, in which:

30 FIG. 1 is an exemplary block diagram for the client/server architecture of one embodiment of the present invention;

FIG. 2 is an exemplary block diagram of a remote user computer connected to a server via Internet according to one embodiment of the present invention;

FIG. 3 is an exemplary flow diagram of an installation wizard;

35 FIG. 4 is an exemplary block diagram of servers, databases, and services according to one embodiment of the present invention;

FIGs. 5A-5B are exemplary interfaces for application plugins;

FIGs. 6A-6E are exemplary interfaces for Internet connection options;

FIGs. 7A-7C are exemplary process flow diagrams for a getting started wizard;

1 FIG. 7D is an exemplary dialog box for allowing a user to cancel a getting started wizard;
FIGs. 8A-8B are exemplary interfaces for registration;
FIGs. 9A-9N are exemplary interfaces for registration and receiving user information;
FIG 10A is an exemplary process flow diagram for a registration wizard;
5 FIGs. 10B-10O are exemplary interfaces for a registration wizard;
FIGs. 11A-11B are exemplary process flow diagrams for a print wizard;
FIGs. 11C-11L are exemplary interfaces for a printing wizard;
FIG. 12A is an exemplary process flow diagram for a re-registration process;
FIGs. 12B-12D are exemplary interfaces for a re-registration wizard;
10 FIGs. 13A-13N are exemplary interfaces for a print wizard;
FIGs. 14A-14B are exemplary diagrams showing an indicium printed on an envelop;
FIGs. 15A-15B are exemplary diagrams of an envelop with and without a graphic paced
in the area to the left of the return address, respectively;
FIG. 15C is an exemplary interface for an envelop printing option;
15 FIGs. 16A-16B are exemplary interfaces for addition of an address book;
FIGs. 17A-17G are exemplary interfaces for messages;
FIG. 18 is an exemplary interface for a main menu;
FIG. 19A is an exemplary process flow diagram for a change of address process;
FIGs. 19B-19I are exemplary interfaces for change of address;
20 FIGs. 20A-20C are exemplary interfaces for change payment method;
FIGs. 21A-21D are exemplary interfaces for change service plan;
FIG. 21E is an exemplary interface for change e-mail information;
FIGs. 22A-22B are exemplary interfaces for password entry & verification;
FIG. 23 is an exemplary interface for a meter withdrawal;
25 FIG. 24 is an exemplary process flow diagram for a registration wizard; and
FIGs. 25A-25C are exemplary interfaces for setting up a digital scale.

DETAILED DESCRIPTION

30 An exemplary on-line postage system is described in U.S. patent Application No. 09/163,993 filed September 15, 1998, the entire content of which is hereby incorporated by reference herein. The on-line postage system includes an authentication protocol that operates in conjunction with the USPS. The system utilizes on-line postage system software comprising user code that resides on a client system and controller code that resides on a server system. The on-line postage system allows a user to print a postal indicium at home, at the office, or any other
35 desired place in a secure, convenient, inexpensive and fraud-free manner. The system comprises a user system electronically connected to a server system, which in turn is in communication with a USPS system.

1 Each of the cryptographic modules may be available for use by any user. When a user
requests a PSD service, one of the available modules is loaded with data belonging to the user's
account and the transaction is performed. When a module is loaded with a user's data ,that
module becomes the user's PSD. The database record containing each user's PSD data is
5 referred to as the "PSD package". After each PSD transaction is completed, the user's PSD
package is updated and returned to a database external to the module. The database becomes an
extension of the module's memory and stores not only the items specified by the IBIP for storage
inside the PSD, but also the user's personal cryptographic keys and other security relevant data
items (SRDI) and status information needed for operating continuity. Movement of this sensitive
10 data between the modules and the database is secured to ensure that PSD packages could not be
compromised.

In one embodiment, the server system is remotely located in a separate location from the
client system. All communications between the client and the server are preferably accomplished
via the Internet. FIG. 1 illustrates a remote client system 220a connected to a server system 102
15 via the Internet 221. The client system includes a processor unit 223, a monitor 230, printer port
106, a mouse 225, a printer 235, and a keyboard 224. Server system 102 includes Postage servers
109, Database 130, and cryptographic modules 110.

An increase in the number of servers within the server system 102 will not negatively
impact the performance of the system, since the system design allows for scalability. The Server
20 system 102 is designed in such a way that all of the business transactions are processed in the
servers and not in the database. By locating the transaction processing in the servers, increases
in the number of transactions can be easily handled by adding additional servers. Also, each
transaction processed in the servers is stateless, meaning the application does not remember the
specific hardware device the last transaction utilized. Because of this stateless transaction design,
25 multiple servers can be added to each appropriate subsystem in order to handle increased loads.

Furthermore, each cryptographic module is a stateless device, meaning that a PSD package
can be passed to any device because the application does not rely upon any information about
what occurred with the previous PSD package. Therefore, multiple cryptographic modules can
also be added to each appropriate subsystem in order to handle increased loads. A PSD package
30 for each cryptographic module is a database record, stored in the server database, that includes
information pertaining to one customer's service that would normally be protected inside a
cryptographic module. The PSD package includes all data needed to restore the PSD to its last
known state when it is next loaded into a cryptographic module. This includes the items that the
IBIP specifications require to be stored inside the PSD, information required to return the PSD
35 to a valid state when the record is reloaded from the database, and data needed for record security
and administrative purposes.

In one embodiment, the items included in a PSD package include ascending and
descending registers (the ascending register "AR" records the amount of postage that is dispensed

1 or printed on each transaction and the descending register "DR" records the value or amount of
postage that may be dispensed and decreases from an original or charged amount as postage is
printed.), device ID, indicia key certificate serial number, licensing ZIP code, key token for the
indicia signing key, the user secrets, key for encrypting user secrets, data and time of last
5 transaction, the last challenge received from the client, the operational state of the PSD,
expiration dates for keys, the passphrase repetition list and the like.

As a result, the need for specific PSDs being attached to specific cryptographic modules
is eliminated. A Postal Server subsystem provides cryptographic module management services
that allow multiple cryptographic modules to exist and function on one server, so additional
10 cryptographic modules can easily be installed on a server. The Postal Server subsystem is easy
to scale by adding more cryptographic modules and using commonly known Internet load-
balancing techniques to route inbound requests to the new cryptographic modules.

Referring back to FIG. 1, Postage servers 109 provide indicia creation, account
maintenance, and revenue protection functionality for the on-line postage system. The Postage
15 servers 109 include several physical servers in several distinct logical groupings, or services as
described below. The individual servers could be located within one facility, or in several
facilities, physically separated by great distance but connected by secure communication links.

Cryptographic modules 110 are responsible for creating PSDs and manipulating PSD data
to protect sensitive information from disclosure, generating the cryptographic components of the
20 digital indicia, and securely adjusting the user registers. When a user wishes to print VBI, for
example, postage or purchase additional VBI or postage value, a user state is instantiated in the
PSD implemented within one of the cryptographic modules 110. Database 111 includes all the
data accessible on-line for indicia creation, account maintenance, and revenue protection
processes. Postage servers 109, Database 130, and cryptographic modules 110 are maintained
25 in a physically secured environment, such as a vault.

FIG. 2 shows a simplified system block diagram of a typical Internet client/server
environment used by an on-line postage system in one embodiment of the present invention. PCs
220a-220n used by the postage purchasers are connected to the Internet 221 through the
communication links 233a-233n. Each PC has access to one or more printers 235. Optionally,
30 as is well understood in the art, a local network 234 may serve as the connection between some
of the PCs, such as the PC 220a and the Internet 221 or other connections. Servers 222a-222m
are also connected to the Internet 221 through respective communication links. Servers 222a-
222m include information and databases accessible by PCs 220a-220n. The on-line VBI system
of the present invention resides on one or more of Servers 222a-222m.

35 In this embodiment, each client system 220a-220m includes a CPU 223, a keyboard 224,
a mouse 225, a mass storage device 231, main computer memory 227, video memory 228, a
communication interface 232a, and an input/output device 226 coupled and interacting via a
communication bus. The data and images to be displayed on the monitor 230 are transferred first

1 from the video memory 228 to the video amplifier 229 and then to the monitor 230. The communication interface 232a communicates with the servers 222a-222m via a network link 233a. The network link connects the client system to a local network 234. The local network 234 communicates with the Internet 221.

5 In one embodiment, a customer, preferably licensed by the USPS and registered with an IBIP vendor (such as Stamps.com), sends a request for authorization to print a desired amount of VBI, such as postage. The server system verifies that the user's account holds sufficient funds to cover the requested amount of postage, and if so, grants the request. The server then sends authorization to the client system. The client system then sends image information for printing
10 of a postal indicium for the granted amount to a printer so that the postal indicium is printed on an envelope or label.

When a client system sends a VBI print request to the Server, the request needs to be authenticated before the client system is allowed to print the VBI, and while the VBI is being printed. The client system sends a password (or passphrase) entered by a user to the Server for
15 verification. If the password fails, a preferably asynchronous dynamic password verification method terminates the session and printing of the VBI is aborted. Also, the Server system communicates with a system located at a certification authority for verification and authentication purposes.

In one embodiment, the information processing components of the on-line postage system
20 include a client system, a postage server system located in a highly secure facility, a USPS system and the Internet as the communication medium among those systems. The information processing equipment communicates over a secured communication line.

Preferably, the security and authenticity of the information communicated among the systems are accomplished on a software level through the built-in features of a Secured Socket
25 Layer (SSL) Internet communication protocol. An encryption hardware module embedded in the server system is also used to secure information as it is processed by the secure system and to ensure authenticity and legitimacy of requests made and granted.

The on-line VBI system does not require any special purpose hardware for the client system. The client system is implemented in the form of software that can be executed on a user
30 computer (client system) allowing the user computer to function as a virtual VBI meter. The software can only be executed for the purpose of printing the VBI indicia when the user computer is in communication with a server computer located, for example, at a VBI meter vendor's facility (server system). The server system is capable of communicating with one or more client systems simultaneously.

35 In one embodiment of the present invention, the cryptographic modules 110 are FIPS 140-1 certified hardware cards that include firmware to implement PSD functionality in a cryptographically secure way. The cryptographic modules are inserted into any of the servers in the Postal Server Infrastructure. The cryptographic modules are responsible for creating PSDs

1 and manipulating PSD data to generate and verify digitally signed indicia. Since the PSD data is created and signed by a private key known only to the module, the PSD data may be stored externally to the cryptographic modules without compromising security.

5 The on-line VBI system is based on a client/server architecture. Generally, in a system based on client/server architecture the server system delivers information to the client system. That is, the client system requests the services of a generally larger computer. In one embodiment, the client is a local personal computer and the server is a more powerful group of computers that house the information. The connection from the client to the server is made via a Local Area Network, a phone line or a TCP/IP based WAN on the Internet. A primary reason
10 to set up a client/server network is to allow many clients access to the same applications and files stored on the server system.

In one embodiment, Postage servers 109 include a string of servers connected to the Internet, for example, through a T1 line, protected by a firewall. The firewall permits a client system to communicate with a server system, only if the information packet transmitted by the
15 client system complies with a security policy set by the server system. The firewall not only protects the system from unauthorized users on the Internet, it also separates the Public Network (PUBNET) from the Private Network (PRVNET). This ensures that packets from the Internet will not go to any location but the PUBNET. The string of servers form the different subsystems of the on-line postal system. The services provided by the different subsystems of the on-line postage system are designed to allow flexibility and expansion and reduce specific hardware
20 dependency.

The Database subsystem is comprised of multiple databases. FIG. 4 illustrates an overview of the on-line VBI system which includes the database subsystems. Database 411 includes the Affiliate DBMS and the Source IDs DBMS. The Affiliate DBMS manages affiliate
25 information (e.g., affiliate's name, phone number, and affiliate's Website information) that is stored on the Affiliate Database. Using the data from this database, marketing and business reports are generated. The Source IDs Database contains information about the incoming links to the vendor's Website (e.g., partners' information, what services the vendor offers, what marketing program is associated with the incoming links, and co-branding information). Using
30 the data from this database, marketing and business reports are generated.

The Online Store Database 412 contains commerce product information, working orders, billing information, password reset table, and other marketing related information. Website database 410 keeps track of user accesses to the vendor website. This database keeps track of
35 user who access the vendor website, users who are downloading information and programs, and the links from which users access the vendor website. After storing these data on the Website Database 410, software tools are used to generate the following information:

- Web Site Status
- Web Site Reports

- 1 • Form Results
- Download Successes
- Signup, Downloads, and Demographic Graphs
- Web Server Statistics (Analog)
- 5 • Web Server Statistics (Web Analyzer)

Offline database 409 manages the VBI (e.g., postal) data except meter information, postal transactions data, financial transactions data (e.g., credit card purchases, free postage issued, bill credits, and bill debits), customer marketing information, commerce product information, meter license information, meter resets, meter history, and meter movement information. Consolidation Server 413 acts as a repository for data, centralizing data for easy transportation outside the vault 400. The Consolidation Server hosts both file and database services, allowing both dumps of activity logs and reports as well as a consolidation point for all database data. The Offline Reporting Engine MineShare Server 415 performs extraction transformation from the holding database that received transaction data from the Consolidated Database (Commerce database 406, Membership database 408, and Postal Database 407). Also, the Offline Reporting Engine MineShare Server handles some administrative tasks. Transaction data in the holding database contains the transaction information about meter licensing information, meter reset information, postage purchase transactions, and credit card transactions. After performing extraction transformation, business logic data are stored on Offline Database 409. Transaction reports are generated using the data on the Offline Database. Transaction reports contain marketing and business information.

The Data Warehouse database 414 includes all customer information, financial transactions, and aggregated information for marketing queries (e.g., how many customers have purchased postage). In one embodiment, commerce Database 406 includes a Payment Database, an E-mail Database, and a Stamp Mart Database. The E-mail DBMS manages access to the contents of e-mail that were sent out to everyone by vendor servers. The Stamp Mart database handles order form processing. The E-commerce Server 404 provides e-commerce related services on a user/group permission basis. It provides commerce-related services such as payment processing, pricing plan support and billing as well as customer care functionality and LDAP membership personalization services. A Credit Card Service is invoked by the E-commerce Server 404 to authorize and capture funds from the customer's credit card account and to transfer them to the vendor's merchant bank. A Billing Service is used to provide bills through e-mail to customers based on selected billing plans. An ACH service runs automatically at a configurable time. It retrieves all pending ACH requests and batches them to be sent to bank for postage purchases (i.e. money destined for the USPS), or Chase for fee payments which is destined for the vendor account.

The E-commerce DBMS 406 manages access to the vendor specific Payment, Credit Card, and Email Databases. A Membership DBMS manages access to the LDAP membership directory

1 database 408 that hosts specific customer information and customer membership data. A Postal
DBMS manages access to the Postal Database 407 where USPS specific data such as meter and
licensing information are stored. A Postal Server 401 provides secure services to the Client,
including client authentication, postage purchase, and indicia generation. The Postal Server
5 requires cryptographic modules to perform all functions that involve client authentication,
postage purchase, and indicia generation.

Postal Transaction Server 403 provides business logic for postal functions such as device
authorization and postage purchase/register manipulation. The Postal Transaction Server requires
the cryptographic modules to perform all functions. There are four Client Support Servers.
10 Address Matching Server (AMS) 417 verifies the correct address specified by a user. When the
user enters a delivery address or a return address using the Client Software, the user does not
need the address matching database on the user's local machine to verify the accuracy of the
address. The Client software connects to the vendor's server and uses the central address
database obtained from the USPS to verify the accuracy of the address. If the address is
15 incorrect, the client software provides the user with a prioritized list of addresses to match the
correct address. These choices are ranked in a user definable order. This information is
represented using a plain text format.

The Client Support Servers 417 provides the following services: a Pricing Plan service,
an Auto Update service, and a Printer Config service. The Pricing Plan Service provides
20 information on pricing plans and payment methods available to the user. It also provides what
credit cards are supported and whether ACH is supported. This information is represented
preferably using a plain text format. The Auto Update Service verifies whether the user is
running the latest Client Software. If there is newer Client Software, the Auto Update Server
downloads the new patches to the user computer. The Client Support Database has tables for the
25 client software update information. This information is represented using a plain text format.
Before the user tries to print postage, the user sends his or her printer driver information over the
Internet in plain text. A Printer Config Service looks up the printer driver information in the
Printer Driver Database to determine whether the printer driver is supported or not. When the
user tries to configure the printer, the user prints a test envelope to test whether the postage
30 printing is working properly or not. This testing envelope information is sent over the Internet
in plain text and is stored in the Client Support Database.

MeterGen server 422 makes calls into the cryptographic module to create sufficient meters
to ensure that the vendor can meet customer acquisition demands. SMTP Server 418
communicates with other SMTP servers, and it is used to forward e-mail to users. Gatekeeper
35 Server works as a proxy server by handling the security and authentication validation for the
smart card users to access customer and administration information that reside in the vault. The
Proxy Server 423 uses the Netscape™ Enterprise SSL library to provide a secure connection to
the vault 400. Audit File Server 419 acts as a repository for module transaction logs. The Audit

1 File Server verifies the audit logs that are digitally signed. The audit logs are verified in real time as they are being created. Postal Server writes audit logs to a shared hard drive on the Audit File Server. After these logs are verified, the Audit File Server preferably moves them from the shared hard drive to a hard drive that is not shared by any of the vendor servers.

5 Provider Server provides reporting and external communication functionality including the following services. CMLS Service forwards license applications and it processes responses from CMLS. The CMLS Service uses cryptographic functions provided by the Stamps.com Crypt library to decrypt the user's SSN/Tax ID/Employee ID. CMRS Service reports meter movement and resetting to the USPS Computerized Meter Resetting infrastructure. ACH Service
10 is responsible for submitting ACH postage purchase requests to the USPS lockbox account at the bank. The CMLS Service uses cryptographic functions to decrypt the user's ACH account number. After decrypting ACH account information, the ACH is encrypted using the vendor's script library. Then, the encrypted ACH file is e-mailed to the Commerce Group by the SMTP server. When the Commerce Group receives this encrypted e-mail, the vendor's Decrypt utility
15 application is used to decrypt the ACH e-mail. After verifying the ACH information, the Commerce Group sends the ACH information through an encrypted device first and then uses a modem to upload the ACH information to a proper bank. The Certificate Authority issues certificates for all IBIP meters. The certificates are basically used to provide authentication for indicia produced by their respective meters.

20 The following are the steps describing the certificate authorization process:

- MeterGen asks the module to create a meter package,
- The module returns a package and the meter's public key,
- MeterGen creates a certificate request with the public key, signs the request with a USPS-issued smartcard, and submits the request to the USPS Certificate Authority,
- 25 • The Certificate Authority verifies the request came from the vendor then, it creates a new certificate and returns it to MeterGen,
- MeterGen verifies the certificate using the USPS Certificate Authority's certificate (e.g., to ensure it wasn't forged) and stores the certificate information in the package. The package is now ready to be associated with a customer.

30 The Postal Server subsystem 401 manages client and remote administration access to server functionality, authenticates clients and allows clients to establish a secure connection to the on-line postage system. The Postal Server subsystem also manages access to USPS specific data such as PSD information and a user's license information. The Postal Server subsystem queries the Postal portion of the Database subsystem for the necessary information to complete
35 the task. The query travels through the firewall to the Postal portion of the Database subsystem. The Postal Server subsystem is the subsystem in the Public Network that has access to the Database subsystem.

1 In one embodiment of the present invention, Postal Server 401 is a standalone server
process that provides secure connections to both the clients and the server administration utilities,
providing both client authentication and connection management functionality to the system.
Postal Server 401 also houses postal-specific services that require high levels of security, such
5 as purchasing postage or printing indicia. Postal Server 401 is comprised of at least one server,
and the number of servers increases when more clients need to be authenticated, are purchasing
postage or are printing postage indicia.

The growth in the number of servers of the Postal Server will not impact the performance
of the system since the system design allows for scalability. The Postal Server is designed in
10 such a way that all of the business logic is processed in the servers and not in the database. By
locating the transaction processing in the servers, increases in the number of transactions can be
easily handled by adding additional servers. Also, since each transaction is stateless (the
application does not remember the specific hardware device the last transaction utilized),
multiple machines can be added to each subsystem in order to handle increased loads. In one
15 embodiment, load balancing hardware and software techniques are used to distribute traffic
among the multiple servers.

The client software includes GUI and wizards for software installation, user registration,
printing of VBI, account information access, payment, and the like. An installation wizard helps
the user to install the client software. FIG. 3 is an exemplary flow for the installation routine.
20 In blocks 301-305, the user agrees to the software license agreement and selects a destination
directory and folder for the installation software. In blocks 306-307, the user selects the
appropriate ISP and connects to Internet. Links to other application software and address book
are installed in blocks 308 and 309, respectively. Any desired plugin software is downloaded and
installed in blocks 312 and 315. In block 311, the program files are installed and in block 314
25 the Readme is installed and the user computer is re-booted. The install wizard supports an Auto
Update before the software is installed. Specifically, the install wizard checks the server for a
newer version of the client software before installing the software. If a newer version is
available, then the install wizard notifies the user that a newer version is available on the server,
and prompts the user whether or not the file is downloaded. If a newer version is not available,
30 then the install wizard proceeds.

The install routine supports the installation of third party applications, including MS
Word™, and Word Perfect™. The plugins for these applications are preferably included in the
download file. The install wizard preferably prompts the users which of these, if any, they would
like to install. An exemplary interface is shown in FIG. 5A. Address book plugins help the user
35 select an appropriate plugin to support the function of an address book. The Install Address
Book plugins are not part of the standard download file in the preferred embodiment. Rather,
each plugin is its own file that resides on the web. The install wizard preferably prompts the user
which, if any of the plugins is installed. If multiple selections are made, the user is prompted for

1 a default address book. The interface for this function is shown in FIG. 5B. This list is dynamic
so that the Address Book plugins can be added or subtracted without requiring a full client
update.

5 The installation routine also supports OEM branding. Specifically, the install wizard is
such that the elements described in OEM branding are stored in a resource file, so that the install
routine itself preferably does not need to be changed – rather the resource file is changed. The
installation routine or the Getting Started wizard also supports the OEM branding requirements.
Specifically, a cookie is read and its contents are uploaded to the server.

10 FIGs 6A-6E are exemplary interfaces for the Internet connections. As shown in FIG. 6A,
once the "I connect with my modem..." radio button is selected, the "Click here to confirm
settings text" and "Settings..." button become available. When "I connect using AOL" is chosen,
then an additional wizard screen is seen by the user as shown in FIG. 6B...If "I connect using
CompUServe is chosen, an additional wizard screen is seen by the user as shown in FIG. 6B.

15 When the user first attempts to log in, and a connection cannot be established, an error
message appears based upon which connection method the user has chosen. In one embodiment,
if the user chose to connect by a local area network, the error message shown in FIG. 6C appears.
if the user chose to connect by a dial up networking connection, the error message shown in FIG.
6D appears. if the user chose to connect using AOL, the error message shown in FIG. 6E
appears.

20 Before a user can begin to print postage, a significant number of tasks are preferably first
completed. These steps are combined into a wizard that launches after the customer installs the client
software. The preferred goal is to provide a single, streamlined interface that removes any interruptions
once the user completes the wizard. The overall flow of the user experience in getting started with the
software is shown in FIG. 7A. The Getting Started wizard includes five main components, a
25 Welcome component is responsible for welcoming the user (customer), and determining whether
or not the user should proceed through the complete Getting Started wizard at this time. A Sign
up for Service group of screens leads the customer through signing up for a service plan. A
Registration wizard group of screens handles the meter license application, and can also be
accessed through the client application through the Options screen. A Print Setup group of
30 screens take the user through printer verification and printing a quality assurance (QA) envelope.
This component of the Getting Started wizard includes several independent wizards which can
be accessed through the client software. The Finish portion of the Getting Started wizard
congratulates the user and launches the client software. Preferably, the Getting Started wizard
is comprised of multiple components to facilitate their reuse as individual wizards within the
35 client software.

Typically, the volume of screens that make up the Getting Started wizard are significant.
In order to prevent the user from being overwhelmed with the process, preferably the system
constantly gives the customer a sense as to where they are in the process. To satisfy this goal,

the software utilizes a "Follow the Yellow Brick Road" interface, which constantly updates the users on their progress in the wizard. The left side graphic area is used to indicate which of these stages that the user is currently in. In one embodiment, the stage is indicated using text, with the current stage being highlighted. Using text rather than graphics helps minimize the download size.

Each screen of the Getting Started wizard preferably has a Help button which links to a portion of the Help file that pertains to that screen. Whenever a combo box is used in this wizard, by default no item is selected, and the prompt "select one" preferably appears to the user. Preferably, every screen in the Getting Started wizard has a Cancel button on it. The functionality of these buttons is consistent throughout the wizard. The various functions that are executed when a user selects the Cancel button are described below.

The Verification Prompt is a standard prompt that verifies the user indeed would like to cancel the wizard. This is accomplished through a standard dialog box as shown in FIG. 7D. A Save Data button is also provided. When the user selects the Cancel button, all of the data that the user has input is saved locally. If the user starts the Getting Started wizard at a later time, all of the information that was previously entered is filled into the appropriate screen in the wizard. Using an upload Data button, the client preferably uploads the following data to a log on one of the servers; Customer email, the screen that the user catcalled on (resource ID), and the source (OEM partner, affiliate, etc.). When the Getting Started wizard first attempts to establish an Internet connection and experiences an error in connecting, error messages appear depending upon the connection method chosen by the user.

The Welcome portion of the Getting Started wizard provides two functions. First, it welcomes the user to the process and gives the user an idea of what is involved in the process. Second, it determines whether or not a user should complete the Getting started wizard at this time. There are two reasons why a user is kept from completing the Getting Started wizard, as shown in FIG. 7B. The first is if the user has previously completed the Getting Started wizard, shown by block 721. The second is when the provider's service is over booked and there is no opening available for the user, as shown by block 723. When this portion of the Getting Started wizard has begun, the Follow the Yellow brick Road text t reads "Start". The logical flow of the Sign up for Service component is shown in FIG. 7B. The Welcome Screen #1 720, in FIG. 7B, lists three major steps that the customer should complete in order to finish the wizard. As shown in FIG. 8A, the screen includes a smaller version of each screen group graphic to help the customers recognize each screen group as they come to it. The "Welcome" step of the "Follow the Yellow-brick Road" list is highlighted to show the customers that they are on the Welcome screen. A check box allows a user to skip the Registration and Print Configuration wizard. If the user selects the check box, the wizard closes and the "rereg" dialog box appears. The default state for the check box is unselected.

1 If there is no slot available for the user, the Welcome Screen #2 725, in FIG. 7B, appears to the user in the event that the user cannot be signed up the user at that time. A URL link button links the user to the web site on the page where the user can pre-register, as shown in FIG. 8B. By pre-registering, the user will later be notified when a slot is available.

5 At this point in the Getting Started wizard, the client preferably downloads information from the server for use throughout the remainder of the wizard. Specifically, the information that is downloaded includes Service Plan Information such as Plan Name, Plan ID, Text file describing all of the plans, Contract for the plan (text file), Min purchase amount, Max purchase amount, Purchase Upfront (y/n), URL link to full description (common web link for all plans),
10 Preferred Service Plan; and Payment Information including Payment types accepted, and Preferred payment type.

 The Sign up for Service component of the Getting Started wizard extracts all of the information required to sign up the user for service with the provider. When this portion of the Getting Started wizard has begun, the "Follow the Yellow Brick Road" text is changed to
15 "Register with Provider" (e.g., Stamps.com). The logical flow of the Sign up for Service component is shown in FIG. 7C.

 Service Screen #1 (block 730 of FIG. 7C) is shown in FIG. 9A. The "Send me information..." checkbox is checked by default. Selection of this check box provides a database entry that designates that the provider and its partners have the right to solicit the user with
20 marketing programs. The "Next>" button is not enabled until all required information is filled in. Required information for this screen includes the First Name, Last Name, Phone, and Email.

 Service Screen #2 (block 731 of FIG. 7C) is depicted in FIG. 9B. The fields in the upper portion of the screen allow the user to enter the physical location of the user computer. The lower portion of the screen allows the user to enter mailing address information in one of two
25 ways. If the user selects the "Use physical address" check box, the values stored for the mailing address are made to be the same as those of the physical address, and the "Next>" button becomes enabled. Otherwise, the mailing address fields are enabled for user input. The "Next>" button is not enabled until all required fields are filled in. After the user selects "Next>", an AMS check on the address is performed, as shown by block 732 of FIG. 7C. The client checks
30 for a PO Box in the physical address fields, as shown by block 733 of FIG. 7C. In blocks 734 and 735, if a P.O. Box is provided, an error message preferably indicates that a P.O. Box is not acceptable.

 After service screen #2 is completed, in block 736, an AMS check on the addresses is run. Also, a check is made as to determine whether the zip code that the user provides is currently the
35 one that is supported, as shown in block 737. If it is determined that the physical zip code is one that is supported, the user continues with service screen #3 in block 739. If the zip code is NOT one that is supported, Service Screen #2a appears to notify the user that the user is unable to sign up at this time, as depicted in block 738. An exemplary interface for Service Screen #2a is

1 shown in FIG. 9C. A URL link button links the user to the provider's site on the page where the user can pre-register. By pre-registering, the user is notified later when a slot is available within the zip code for the physical address that is provided.

5 In block 739, the user enters "user name" and "password." An exemplary interface for Service Screen #3 is shown in FIG. 9D. The password preferably comprises at least 6 characters, with at least 1 alpha character and 1 numeric character. The "Next>" button is not enabled until all the information has been filled in. In block 743, Service Screen #4 captures information that either Customer Service or the client software can use to verify a customer's identity in the event that the customer loses his/her password. An exemplary interface for Service Screen #4 is shown
10 in FIG. 9E. The key word, or "secret code" is the answer that the user gives to a question selected by the user. The default questions that the user may select from include;

- What is your mother's maiden name?
- What is your favorite pets name?
- What is your favorite vacation spot?
- 15 • What is your place of birth?

After selecting a question, the user can enter a response into an edit field. The "Next>" button is not enabled until after the information is filled in.

In block 744, in Service Screen #5, the users specify how they will use the account. Preferably, none of the radio buttons are selected on open. An exemplary interface for Service
20 Screen #5 is shown in FIG. 9F. The company information fields and text are grayed-out and disabled until the user selects one of the three business radio buttons. The "Next>" button is not enabled until the user selects the "Personal/Individual" radio button or until the required business fields are populated if the user selects one of the business radio buttons. In addition to storing the user's response for use by the provider, the user's input is interpreted in order to pre-fill
25 portions of the meter license. Specifically, if the user selects the first radio button, "Personal/Individual Use", the user is categorized as a "personal" user for the meter license application. If any of the other three radio buttons are selected, the user is categorized as a business user for the meter license. If the user selects one of the business categories, the data input into the business fields is stored both for use by the provider and for insertion into the meter
30 license application.

Service Screen #6, in block 745, provides several types of information all related to the user's postage usage habits, for use both by the provider and the USPS. In this screen, as depicted in FIG. 9G, the user specifies their mail volume using a spinner box and the letter category is split into window and standard envelopes. In addition, a question is asked with yes
35 or no radio button response options (Do you currently lease or rent a traditional postage meter?). The "Next>" button is preferably not enabled until the user has selected a value in each box. The mail volume box is blank by default. Each of the four percentage boxes preferably has a 0 in it. When the user hits the "Next>" button, verify that the percentage boxes add up to 100%. When

1 storing the percentages for use in the USPS meter license application, the first two percentages (letters – standard envelopes and letters – windowed / pre printed) are added together to create the value for the USPS “letters” category. The other two percentages map equally to their USPS counterparts.

5 Service Screen #7 (block 746) allows the user to select a service plan from the provider. The following information is preferably downloaded at the beginning of the registration wizard: Service Plan names, a URL to a page on the provider's web site that describes the service plans in detail, and text files describing each service plan. FIG. 9H depicts an exemplary interface for this screen. The drop down box preferably displays all available plans at the time. No plans are selected by default, and the prompt “Select One” appears. At this time, a text file that briefly describes all of the plans currently available is displayed in a scrollable text window below. Once the user selects a plan, the text file below is changed to display a text file that describes only that plan. If a preferred service plan is defined, this plan is the first one to appear on the drop down list (still none of the plans selected by default). A URL link takes the user to provider's web site for details on the plans. The “Next>” button is disabled until the user selects a plan.

15 As illustrated in block 747, Service Screen #8 displays the service contract for the service plan that the user selected on the previous screen. This contract is a text file, which is downloaded at the beginning of the registration wizard. As shown in FIG. 9I, neither of the two radio buttons are selected by default, and the “Next>” button is disabled until the user selects one of the choices. If the user selects “I Accept”, the wizard will continue. If the user selects “I do NOT accept”, a message box should appear as described below. This wizard screen should still remain open in the background behind this dialog box. If the user selects “I do NOT Accept on Screen #8 of FIG. 9I, a dialog box, shown in FIG. 9J, appears indicating that the user must accept the terms in order to sign up with the provider. If the user selects “Go Back”, this dialog Box closes, and the user is brought back to screen #8 of the wizard. If the user selects “Cancel”, the Getting Started is canceled.

20 Service Screen #9, depicted in FIG. 9K, is built dynamically, depending upon a user's response to the payment type prompt. The payment type field is empty by default. The values available for this field are preferably downloaded when the registration wizard begins. The “Next>” button is disabled before AND after a value is selected for the payment type. The “Next>” button remains disabled until the screen dynamically builds, and all of the fields are completed by the user. If a preferred payment method is defined, this method of payment is the first one to appear on the drop down list (still none of the payment method types are selected by default).

25 If a credit card is selected as the method of payment in decision block 750, the fields shown in the screen of FIG. 9L appear. The cardholder name and card number are both edit boxes. The expiration date is entered using two combo boxes. The prompt for the billing address

1 allows the user to either enter an address manually, or copy the address given on service screen
#2 as a mailing address. If the user selects the "Use Mailing Address" check box, the mailing
address information is copied into the billing address fields, and these fields are disabled. All
fields preferably should be filled in before the user can proceed. After the user selects "Next>",
5 an AMS check on the address is performed, as shown in block 753.

If ACH method of payment is selected in decision block 750, the fields shown in screen
of FIG. 9M appear. All fields preferably should be filled in before the user can proceed. Service
Screen #10, in block 756 or 757, allows the user to purchase postage. The order is accepted at
this time, but is not processed until the meter license has gone through. At the beginning of the
10 registration wizard, the maximum and minimum purchase amounts associated with a service plan
are downloaded. As shown in FIG. 9N, the user can enter a purchase in one of two ways: by
selecting a pre-defined amount or by entering an amount into an edit box. In one embodiment,
the pre-defined values of the radio buttons are \$10, \$25, \$50, \$100, and \$200. If any of these
values are lower than the minimum purchase amount associated with the plan that the user has
15 selected, then the associated radio button(s) is disabled. Similarly, if any of the pre-defined
values are higher than the maximum purchase amount allowed by the plan that the user selected,
then the associated radio button(s) is disabled. The Purchase Postage control allows the user to
enter in both dollars and cents values. Preferably, none of the radio buttons are selected by
default. If the selected plan offers free postage without requiring a purchase, the "Next>" button
20 is always available. Otherwise, the "Next>" button is disabled until a purchase amount is
selected. If the service plan selected by the user does not require the immediate purchase of
postage, an additional radio button should appear which allows the user to select a value of
"none."

As described above, the Registration Wizard is capable of gathering all of the information
25 that is required by the USPS for a Meter License Application. The information that is extracted
in this wizard is used to generate a USPS 3601A form. FIG. 10A is an exemplary flow of the
Registration wizard component of the Getting Started wizard. When this portion of the Getting
Started wizard has begun, the Follow the Yellow Brick Road text is changed to "Apply for a
Postage Meter". In block 1010, License Screen #1 serves the purpose of letting the user know
30 that he/she is entering the portion of the wizard where the meter license is filled out. The follow
the Yellow Brick Road text will change to meter License application., as shown in FIG. 10B.

In block 1011, the user determines whether they are a business or an end user. In License
Screen #2 (block 1012), the user specifies which identification number they wish to use. None
of the radio buttons are selected on open, as shown in FIG. 10C. The "Next." button as well as
35 the Tax ID#, EIN, and SSN fields are grayed-out and disabled. When the user selects a radio
button, it enables the corresponding field. When the user begins to enter data in a field, it enables
the "Next>" button. License Screen #3 (block 1013) is for the user to answer some business
related questions, as depicted in FIG. 10D. The "Next>" button is not enabled until the questions

1 are answered.

License Screen #3a (block 101a) only appears to business users. As illustrated in FIG. 10E, neither of the radio buttons are selected by default, and the edit fields and the Next button are preferably unavailable when the user first sees this screen. If the user selects "Yes", the Next button becomes available. If the user selects "No", the edit fields become available. Once all of the required fields have been completed, the Next button becomes available. License Screen #4 (block 1015) of FIG. 10F includes a field in which the user enters a Social Security #. The "Next>" button is not enabled until the field is filled in with a nine digit number. In License Screen #5 (block 1016) of FIG. 10G, neither radio button is selected by default. The "Next>" button is initially disabled. If the user selects the "No" radio button, the "Next>" button becomes available. If the user selects the "Yes" radio button, the "Next>" button is not enabled until at least one set of license and finance numbers have been entered.

FIG. 10H is an exemplary interface for License Screen #6 of block 1017. In this screen, neither radio button is enabled by default. The "Next>" button is enabled if the user selects the "No" radio button or once the revoked reason field is populated if the user selects the "Yes" button. FIG. 10I is an exemplary interface for License Screen #7 of block 1018. In this screen, a check box is used to verify the accuracy of the information. Once the check box is selected, the "Next>" button is enabled and the information is submitted to the server. If the user does not select the checkbox, the only options are to go back and make changes or cancel the Getting Started wizard. In addition to the information that was gathered during the wizard, the following information need also be submitted; OEM #, Tracking #, 3rd Party Applications installed, and the Address Books that were installed.

An exemplary interface for License Screen #8 (block 1019) is illustrated in FIG. 10J. This screen serves the purpose of providing a status to the user while all of the information that has been provided in the wizard, including payment information, is uploaded. In addition to uploading the information that has been extracted as part of the Getting Started wizard, the OEM tracking ID is uploaded as well. For OEM partners, the ID is in a registry key. Initially, the "Next>" button on this screen is disabled, and only the text in the upper portion of the screen appears. Once the communication with the server is completed, the text "Select Next to continue" appears, and the "Next>" button becomes available.

In blocks 1021 and 1023, the information entered by the user is checked for any potential errors and the errors are reported to the user. Once the information has been submitted, the server is able to communicate if any of three errors occur with the information that the user has provided. These errors include a non unique user name, bad ACH information, and rejected credit card payment. If any of these errors occur, a wizard screen appears that dynamically displays the error that is returned from the server. When the user selects "Next>", the appropriate wizard screen shown in FIG. 10K appears and allows the user to resubmit information. Preferably, the User cannot continue until the error is corrected. After correcting the error, the

1 wizard returns to the submit screen. If an additional error is found, this routine is repeated.

5 In block 1028, if the user submits a non unique user name, the dialog box of FIG. 10L appears. This dialog box preferably has the same functionality of the user name wizard screen, except that the lower portion (the password portion) is not displayed, the suggest button appears, and the text changes as shown. If the user selects the Suggest button, the client populates the user name field with the suggestion that is sent down from the server. In block 1026, if the ACH check indicates that there is a problem with the ACH information, the dialog box depicted in FIG. 10M appears. This dialog is preferably the same as the select payment screen of the wizard, with one exception; the Payment Type is pre-filled with the selection "ACH" and as a result the ACH fields will be available. These fields are preferably pre-populated.

10 In block 1027, if a reject on a credit card process is received, the dialog box shown in FIG. 10N appears. This dialog is preferably the same as the select payment screen of the wizard, however, the Payment Type is pre-filled with the original credit card selection, with all of the associated fields pre-filled. In block 1024, the License Screen # 9, illustrated in FIG. 10O, serves the purpose of letting the user know that the meter license portion has been completed, and that the Print Configuration will be next. In addition, this screen dynamically lets the user know what the expected wait time is in the second paragraph based upon a "license approval delay variable" that is downloaded from the server. If the license approval delay variable is "0" (i.e. instant approval) then the second paragraph is not displayed. If the license approval delay has a value other than 0, the second paragraph is displayed and dynamically inputs the delay amount as shown below. The variable number that is provided by the server is in hours. Once this verification is completed the user may proceed to Print Setup wizard, as shown in block 1025.

15 The Print Setup portion of the Getting Started wizard includes several wizard components, which can be broken out and used individually in the client software. These wizards are brought together into the Print Setup portion of the Getting Started wizard to provide all of the printing oriented checks and tasks that a user should complete before starting with the software. These include: Print Verification, Print QA envelope, and Determine top, center, or bottom envelope feed (if necessary). When this portion of the Getting Started wizard has begun, the Follow the Yellow Brick Road text is changed to "Test Printer". An exemplary flow of the Print Setup component is shown in FIG. 11A.

20 In block 1101, Print Setup Screen #1 is used to select default printer. This screen, shown in FIG. 11C, prepares the user for testing on the user's printer. A drop down box displays all of the printers that are installed on the user's system, and allows them to select the default printer to be used. When a user selects a printer, this printer is considered as being selected for the print jobs that are performed during this section of the wizard. In addition, this default selection is incorporated into the standard Print Prepare dialog box, and is therefore the printer chosen until the user selects otherwise. None of the printers is selected by default, and the "Next>" button preferably is not available until the user selects a printer.

1 In block 1102, Print Setup Screen #2, shown in FIG. 11D, allows the user to select two bits of information that are required before the print testing functions can be undertaken. The first is a drop down box, which allows users to select an envelope size to be used throughout the tests. These tests do not allow a user to use labels, so only the envelope options appear. The
5 second bit of information is whether or not the user wants to omit the return address or not. The user prompt is preferably different here than in the Print Options dialog. In this case, if the user selects, "yes", the return address is printed. If the user selects "no", the return address should not be printed. The answers to both of these items are stored and used for all testing undertaken within this portion of the wizard. The information that is gathered here is also used to populate
10 the corresponding fields within the Print Postage and Print Options dialog boxes when the user first launched these screens. Neither the envelope sizes, nor the radio buttons contain values by default. Furthermore, the "Next>" button is preferably not available until the user selects an envelope size and answers the yes/no question.

In block 1103, it is determined whether the default printer information is in the printer
15 database. If the printer information is not in the database, a printer troubleshooting routine is performed, as shown in block 1104. If the printer information is in the database, printer Screen #3, depicted in FIG. 11E, appears. This screen serves the function of notifying the user that postage is about to be printed, and making the user aware that an envelope must be loaded into the feeder. A graphic of an envelope being placed into a printer is preferably used to help re-
20 enforce the action to the user. This screen is used multiple times during the Printer Setup portion of the Getting Started wizard. See the flow diagram for further details. The "Next>" button is available immediately. Once the "Next>" button has been selected, a sample QA envelope is printed, as shown in block 1106. In block 1107, the sample is compared with a sample shown in Printer Screen #4 of FIG. 11F. In this screen, neither of the radio buttons is selected by
25 default, and the "Next>" button is not available until the user selects one. In block 1108, if the samples do not compare, printer troubleshoot 2 is activated to perform the troubleshooting task, as illustrated in block 1109. If the samples compare correctly, the printer information is uploaded and the money in the meter is checked, as shown in blocks 1110 and 1111 respectively.

Similar to Printer Screen #3, Printer Screen #4 serves the function of educating the user
30 about QA envelopes, notifying the user that postage is about to be printed, and making the user aware that an envelope needs to be loaded into the feeder. A graphic of an envelope being placed into a printer is used to help re-enforce the action to the user. This section of the wizard, illustrated in FIG. 11G, only appears if there is money in the user's meter (this requires instant meter approval), as shown in blocks 1111 and 1112. The "Next>" button is available
35 immediately. Once the "Next>" button has been selected, a QA envelope is printed in block 1114.

Next, in block 1115, Printer Screen #6, shown in FIG. 11H, appears. This screen's primary function is to educate the user that the QA envelope should be sent in immediately, or

1 the user's meter license may be revoked. A graphic of an envelope being placed into a mail box is used to help re-enforce the action to the user. The "Next>" button is available immediately.

In the event that the user's printer is not in the printer database, the Print Configuration wizard is initiated. An exemplary flow for the Print Configuration wizard is shown in FIG. 11B. 5 The first screen in this wizard is Printer Setup screen #3 (see FIG. 11E), which prompts the user to place an envelope in the printer feed tray. Once the user selects "Next>", a pattern including a circle, a square, and a triangle is printed. Only one of these shapes completely prints onto the envelope fed through the printer, so based upon which shape appears to the user, the system can ascertain if the printer feeds envelopes from the top, center, or bottom. The Printer Screen #7, 10 shown in FIG. 11I, provides a means by which users can tell the client which of the shapes appear on the envelope. This is done through a series of radio buttons. None of the radio buttons is selected by default, and the "Next>" button is not available until the user selects one of the options. If the user selects either the circle, square, or triangle, the appropriate offset is made, the information is sent to the server, and the user continues with screen #8 as shown in block 15 1126 and 1127.

In block 1123, if the user selects "none of the above match what I see" on screen # 7, Printer Screen #8, shown in FIG. 11J, appears to ask the user which option the user would like to pursue at this time. Three radio buttons provide the options. If the user selects the Try printing another sample option, another shape design is sent to the printer, so that the comparison 20 process can be undertaken again. Selecting the Try printing another sample to a different printer option links the user back to screen #1 of the Print Setup, allowing the user to select another printer and start the process again. Selecting the Neither of these solutions work option indicates that the system cannot determine a feed offset and therefore cannot print envelopes using the user's printer. When "Next>" is selected, the message on screen #9 conveys this to the user. 25 None of the radio buttons is selected by default, and the "Next>" button is not available until the user selects one of the options.

If the user selects "neither of these solutions work" on screen # 8, print envelope is disabled and Printer Screen #9, shown in FIG. 11K, appears to ask the user to let the user know that he/she is not able to print postage onto envelopes, only onto labels (see blocks 1128 and 30 1129). The "Next>" button is available immediately. Once selected, the client preferably disables printing to envelopes. A Finish portion of the Getting Started congratulates the user for completing the wizard, and launches the client. When this portion of the Getting Started wizard has begun, the Follow the Yellow Brick Road text is changed to "Finish". An exemplary interface for Finish screen #1 is illustrated in FIG. 11L. The "Finish" button is preferably 35 available immediately. Once the "Finish" button has been selected, the user is ready to launch the client software.

A re-registration process allows users to re-register across systems. An exemplary flow for the re-registration process is shown in FIG. 12A. To begin the re-registration process, the

1 user logs in as normal via the login dialog box shown in FIG. 12B. The client sends the User
Name, Password, and system identification information to the server. After checking for the
validity of the user name and password, the server checks if the user is currently registered on the
current system, or on another system. In block 1203, if the user is registered on the current
5 system, login continues as normal, as shown in block 1204. If the user is currently registered on
another system, in block 1206, another check is made to determine if the user is currently logged
into the provider's service. In block 1207, if the user is already logged in, the message in FIG.
12C appears. In block 1209, when the user selects "OK" the login attempt is aborted. In block
1208, if the user is currently registered on another system, and is not currently logged in, then the
10 dialog box of FIG. 12D appears. This dialog box prompts the user as to whether the user wants
to re-register is/her account on the current machine. In block 1210, if the user selects "Yes", the
account is re-registered (block 1211). If the user selects "No", the login attempt is aborted (block
1212).

The client print engine prints a Facing Identification Mark (FIM) in accordance with USPS
15 specifications. Preferably, the FIM is printed within 1/8" from the top of the envelope, and no
more than 2 1/8" from the right hand edge, as shown in FIG. 13A. A print engine supports as
broad of a range of printers as possible, utilizing whatever specialized techniques that are deemed
appropriate for proper printing of the postage indicia (i.e. rotation and virtualization). Before
rotation is applied to an individual client, a verification is performed to verify that the user's
20 printer and print driver are known to work with this technique. This is accomplished using a check
against a database of printers and printer drivers that are known to work with rotation within the
client software. This database is preferably created through hands on testing. Some examples
of print dialog boxes for the Print Postage dialog box, Print Prompt dialog box, and Printing
Options dialog box are shown in FIGs. 13B-13I.

25 A Print Postage dialog box is the main interface from which a user defines the postage to
be printed. An exemplary interface for this dialog box is illustrated in FIG. 13J. Return Address
items are grouped within their own frame. The Return Address box is editable, allowing users
to customize the return address by simply typing into the box. Delivery Address items are
grouped within their own frame. The Delivery Address box is editable, allowing users to insert
30 a delivery address by simply typing into the box. If a user adds an address which is not in the
address book, the user is prompted whether or not the address is added. In the event that only a
single recipient is chosen, the address is displayed in the same format that it is in the return
address window. If multiple recipients are selected, the view is that of a list box displaying the
names of all of the recipients that have been chosen. If multiple recipients are selected and
35 different recipients require mailing to different zones, then the cost of postage is displayed next
to that recipient.

"Do not print the Return Address" is unchecked by default. Mail Type toggle buttons
enable the user to select whether the mail to be sent is a letter, flat, box or oversized box. This

1 information is used to determine what labels and/or envelopes are available to the user, as well
as what the postage rate will be. The letter toggle is selected by default. Mail type description
field provides a brief description of the mail type that is currently selected with the Mail Type
toggle buttons. Print On list box allows user to select from all Envelopes and Labels. The items
5 displayed in this list box are determined by the type of mail that was selected in the previous list
box. If a letter is selected, only envelopes and labels approved by the USPS are available. If a
flat or box is selected, only labels approved by the USPS are available. No values are selected
by default.

The Enter Weight fields allow users to type in values or select them using spinner controls.
10 If the user has set up a digital scale, clicking on the scale button automatically pulls the value
from the scale and display the value in these fields. After the initial use, the fields remember the
last value. The "Select a Service" control is a list box, which shows the various services that are
available and also displays the cost of each type of service for the mail piece that has been
defined. The prices update as the user inputs information into the Enter Weight fields. If the user
15 is typing a value, the display immediately updates as the user types. If zone based postage is
used, and if multiple users are selected, the range of costs is displayed. Once a user has selected
a mail service, a graphic of a check mark should appear immediately to the left of the item as
shown. None of the items are selected by default. Available Postage display displays the
available postage amount. Total Mailing Cost displays the cost of the total mailing when
20 multiple recipients are selected.

Preview Window is dynamic, depending upon the selection from the "Print Onto" list Box.
Print button decides whether to print a sample or real postage. This single print button advances
the user to the Print Prompt screen. Options button launches the appropriate options dialog box,
depending upon the selection type into the "Print Onto" list Box. If an envelope is selected, the
25 Envelope Options dialog box will be launched. If a label is selected, the Label Options dialog
box appears. In the event that multiple recipients and/or zone based postage rates are selected,
portions of the Print Postage dialog changes slightly in their functionality, as shown in FIG. 13K.

In the exemplary screen of FIG. 13K, when multiple recipients are selected, they are
displayed as a list with only the recipient name showing. When multiple recipients are selected
30 which span multiple zones, the price of the mail piece going to an individual recipient is
displayed next to the recipient's name. This display only appears after a weight value that
warrants zone based postage has been entered. The Select a Service list box shows a range of
prices for the mailings. The Cost of Mailing display appears when multiple recipients are
selected, and provides the user with a total cost for the mailing.

35 After the user has selected "Print" from the Print Postage dialog box, the Print Prompt
dialog box of FIG. 13L appears. The Print Prompt dialog box takes on several functions,
including selection of the printer, printer paper feed, and determination of whether a sample or
real piece of postage is being printed. The printer list boxes provide a selection of available

1 printers. Standard Windows displays (optional) display the selected printer. Existing printer feed
information displays relevant information about the selected printer. Print Internet Postage and
Print Sample buttons print postage, and the Configure button launches the Print Configuration
wizard.

5 Envelope Options dialog box, depicted in FIG. 13M, is launched from the Print Postage
dialog box when two conditions are met: 1) the user selects the "Options" button, and 2) an
envelope is selected in the "Print Onto" drop down box. Do not print a FIM check box has a
small graphic icon to let the user know what the FIM barcode is. Postdate Mail piece control has
a text description as shown. If the user selects the check box, the edit box becomes available to
10 allow editing. Indicum correction items allow the user to print two forms of special Indicia:
postage correction and date correction. Return Address Graphic control allows the user to select
a graphic to be printed with the return address. Return Address adjustments and Delivery
Address adjustments controls provide margin adjustments for the return address and delivery
address, respectively. Indicum graphics that can be displayed within the Indicum are preferably
15 controlled by the provider. To accomplish this, the system provides graphics for the Indicum
in a digitally signed format, embedded within a DLL. At a minimum, this graphic is used for
OEM partners. The system also provides clip art for the Indicum graphics. The system therefore
makes sure that this DLL can be downloaded on its own, so that a clip art library can be updated
without forcing a complete download of the client. If the DLL is not present, this control is
20 unavailable.

FIG. 13N is an exemplary interface for a Label Options dialog box. This dialog box is
launched from the Print Postage dialog box when the user selects the "Options" button, and a
label is selected in the "Print Onto" drop down box. Do not print a FIM check box control has
a small graphic icon to let the user know what a FIM barcode is. Postdate Mail piece control has
25 a text description as shown. If the user selects the check box, the edit box becomes available.
Indicum correction items allow the user to print two forms of special Indicia: postage correction
and date correction. Indicum graphics that can be displayed within the Indicum are preferably
controlled by the provider. To accomplish this, the system provides graphics for the Indicum
in a digitally signed format, embedded within a DLL. At a minimum, this graphic is used for
30 OEM partners. The system also provides clip art for the Indicum graphics. The system therefore
makes sure that this DLL can be downloaded on its own, so that a clip art library can be updated
without forcing a complete download of the client. If the DLL is not present, this control is
unavailable. Delivery Address font control allows the user to change the font of the Delivery
Address by launching a secondary dialog box.

35 A Print Configuration wizard helps the user undergo three major processes: determining
top, center, or bottom offset (if needed), providing print verification, and Printing a QA envelope.
The print engine preferably incorporates the provider's logo into the Indicum. Rather than
integrating a single static logo graphic, the print engine accommodates a scalable graphic. The

1 reasoning behind this is as follows. In order to conform to the FIM placement standards which
requires that the FIM consistently be printed 2" +/- 1/8" from the right hand edge of the envelope,
the space available between the FIM and the human readable portion of the Indicum will change
depending upon the right hand margin of the printer used, as shown in FIG. 14A. The logo is
5 scaled to the maximum size available given the space constraints which arise from the individual
printer margin. This approach ensures that the maximum log size is always used, as shown in
FIG. 14B.

A means by which users can customize their mail piece with a graphic file of their
choosing is provided by the system. The system provides users with the ability to incorporate
10 a graphic into the return address space. Specifically, the client software allows the user to
incorporate a standard graphic into the area to the left of the return address, as shown in FIG.
15A. The default state is that no logo is selected for this position. In the event that no logo is
selected, the layout is as shown in FIG. 15B. The controls for the determination of the image to
occupy this space are found in the Print Postage Options (Envelope Printing Options) dialog box
15 of FIG. 15C. When Include Graphic check box is selected, it indicates that the print engine
should print a graphic file. When this check box is not selected, the print engine should not print
a graphic. The default for this check box is unselected. Selecting the Browse button opens a
standard file browse dialog box, which allows the user to browse for and select a file. Preview
Window provides a preview of the selected graphic once it has been selected.

20 A personal address book may be used by the user to print addresses on the mail pieces.
The client's native address book is functional even when the user is offline. Specifically, the user
is able to add addresses, edit addresses, import addresses, and remove addresses without
requiring the user to login online. In order to ensure that every address that is entered, modified,
or imported undergoes an AMS check, addresses undergo an AMS check at the time the postage
25 is printed to an address (see Printing description). In addition to the native address book, the
system provides support for a variety of external address books. Examples of some of the
address books supported include Microsoft Outlook™, Schedule +™, Symantec ACT!™, Lotus
Organizer™, Lotus Notes™, GoldMine™, Microsoft Windows Address book, and the like.

The client's support for the external address books is such that the user can read data from
30 any of these address books from within the standard client address book interface. The data is
able to be read in real time. In addition, the user is able to make changes to addresses and write
these changes back to the external address book. In order to allow the user to select which
address book to use (either the native or any of the third party address books), several controls
are added to the client Address Book interface, as shown in FIG. 16A. Select an Address Book
35 combo box contains a list of all address books that are supported by the client, and have been
installed by the user. The default is set to the system's Address Book. Preferably, this drop down
box remembers the last selection. Select a database or file combo box control displays a list,
which includes the default file or database (depending upon the provider), and any other file that

1 the user has previously opened using the browse button. Browse button allows the user to open
additional files or databases for the Address Book selected by launching the appropriate "open"
dialog for the provider. Preferably, when possible, the only controls on the Address Book
provider's open screen is the bare minimum that are required to open a file. The user can modify
5 addresses using the "properties" button. Based upon which Address Book is selected, a different
set of fields is displayed within the edit properties dialog box. The fields map to the format of
the Address Book that is selected. The user has the ability thereafter to switch Address Books
on-the-fly, by selecting the appropriate Address Book from the selection box as shown in FIG.
16A.

10 In one embodiment, the code that provides support for each Address Book is created as
a plugin, allowing users to only download the Address Books that they want support for. The
install routine provides a means by which users can select which Address Books are downloaded,
and automate the installation of the plugin. Support is provided for importing other address data.
For example, the system provides import filters for the following: Daytimers, The Learning
15 Channel products, MYOB, and the like. Also, Address Books support standard group
capabilities. The system is capable of providing support for foreign addresses, and is able to pass
AMS matching checks. Furthermore, the system provides the capability to print addresses that
have been returned by AMS in a format that includes both upper and lower cased alpha
characters. In other words, the address that is printed should preferably have the same formatting
20 of upper and lower case characters as the user originally entered. When multiple recipients are
selected from the Address Book, the dialog box shown in FIG. 16B appears to educate the user
about multiple recipient selection. Selecting Ok closes the dialog box and returns the user to the
Print Postage dialog box. If the user selects the check box (which is unselected by default), this
dialog box will not appear again in the future.

25 The Address Book within the client provides a utility to import text files that have been
exported from other Address Books. Typically, when a user imports a text file, the user need to
"map" the fields from the original file into the fields of the destination file. This is very
cumbersome for the user, and often prevents users from successfully importing files. To avoid
forcing the user to map fields, the system provides import "filters," that are unique filters written
30 for each Address Book. Since each filter is unique to an individual source file, the filter knows
the data field structure of the source file (and it knows the data structure of the destination system
Address Book). With this knowledge, the import filter is able to import files from other Address
Books without requiring any data structure input from the customer. To meet the brandability
needs, the system accommodates an easy addition of import filters.

35 The system also provides a flexible messaging system, which includes a communication
channel between the provider and its users through the client software. Messages may be created
by various departments within the provider's organization and are pushed by the server to one of

1 several types of messaging dialog boxes. Some examples of messaging dialog boxes are described in detail below.

FIG. 17A is an exemplary message dialog box. The graphic indicates the message category, the Text box displays characters of text in a non-editable text box, the URL Link button is dynamic and is available only when a URL address is included with the messages, and the OK button closes the dialog box. If applicable, selection of the OK button also executes a function (see specific cases, below). For client / server communications, the server is able to assign a message to any of the following: Individual users, all users, and a group of users (defined by any attribute that system stores). The client checks the server for messages awaiting the individual user at login. If a message is found for the individual user, the server sends the following information down to the client: Message type, Message Text, and URL link. In addition, if the message type is "payment" the following information are also sent: date of payment rejection, type of payment for payment rejection, account for payment rejection, and amount of payment rejection.

15 In the event that a message is awaiting a user at the time of login, the client displays one of several types of messaging dialog boxes. The specifics of the dialog box that is displayed is dependent upon the "Message Type" that awaits the user. Generally speaking, the types of messages available fall into one of two categories: generic or template. The generic message type includes marketing messages, customer support messages, etc, where the intent of the messaging is simply to communicate with the user and perhaps provide a URL link. The template message types include payment resubmission, email resubmission, and plan change notifications, where in addition to sending a message to the user the messaging dialog box allows the user to take action on the message. In one embodiment, template dialogs are hard coded into the client system to accommodate the special actions that are taken. Marketing Messages allow the provider to communicate with the user base. For example, the Marketing Message dialog box allows the provider to promote an item that is sold on their web site, and provide a URL link to that item. An example of the specific components of a marketing message are shown in FIG. 17B. In the Icon graphic, a generic Marketing Message icon appears. The text for Text box is customizable at the server. If the provider wants to associate a URL with the message, a URL link button named "More Info..." appears. The OK button closes the dialog box.

25 A Customer Service Message is preferably the same in functionality as the Marketing Message dialog box, except that the graphic icon is different. The different graphic communicates to the user that this message is a different type of message than a Marketing Message. The Customer Service dialog is designed to communicate customer support issues, as shown in FIG. 17C. A Credit Card Promotion message type, as shown in FIG. 17D allows the provider to broadcast credit card promotions to the users. The graphic icon communicates the message type to the user. In one embodiment, this graphic includes the MasterCard logo. The text on the URL link button reads "Apply Now". FIG. 17E is an exemplary dialog box for

1 Payment Resubmission Message. The Payment Resubmission Message is a template type of
message. The purpose of this template message box is to convey to a user that a payment has
been rejected, and facilitate a payment resubmission by the user. As illustrated in FIG. 17E, a
Payment Message icon appears in the icon graphic. The Text box is dynamic, explaining the
5 details of the failed transaction. The end of the message typically reads "Select OK to resubmit
your payment," and the OK button closes the dialog box and launches the purchase postage
screen.

Email Resubmission Message is a template type message, whose purpose is to notify a
user when the system does not have a valid email address for him/her, and enable the user to
10 provide this information. Exemplary elements of this type of message dialog are shown in FIG.
17F. An Email Message icon appears in the icon graphic. The text for the Text box is static and
the contents of the text box are shown in the graphic. An Email edit box allows the user to enter
an email address, and the OK button closes the dialog box, and sends the user's email address
to the server.

15 A Change in Service Plans Message (also a template type message), indicates when new
plans are available to a user, or if the user's current plan is going to be grandfathered. This
message dialog basically indicates the change to the user and links the user to the change plans
dialog and to more information about change plans, if desired. Exemplary elements of this dialog
are shown in FIG. 17G. As shown, a Service Plans Message icon appears in the icon graphic.
20 The text for the Text box is dynamic, and displays the plan changes. This text ends with the text
string "Select 'OK' to view the new plan, or cancel to continue. The OK button closes the dialog
box, and opens the Change Service Plans dialog box. The Cancel button closes the dialog box
without opening the Change Service Plans dialog box. A Message Log is created to list a history
of the messages that a user has received. This log is accessible from the "Accounts" screen, and
25 have the standard layout and capabilities of the other logs within the client.

The client software checks for available updates at the beginning of the installation
routine, before any files have been installed, and at each login. At each of these times, the client
checks for an available update. If an update is available, a dialog box appears. This dialog box
provides a message which communicates the details of the available update, and provides a URL
30 link to a website where the update file can be downloaded. The update file may be classified as
either mandatory or optional. If the update is mandatory, the update is installed by the user. If
the update is optional, the user can choose whether or not to install the file. There are no
restrictions regarding how many update messages can be sent out, and the update message is not
tied into the standard messaging described earlier in this document. The auto update feature is
35 able to copy individual files so that a version can be updated without requiring a complete update.

In one embodiment, the system includes OEM branding capabilities. The system allows
for the customization of the installation script in several ways, including the option of running
a silent install, defining a default installation directory, and defining a default installation group.

1 The default behavior of the installation routine is to run as an application that is visible to the user, and requires user input on multiple screens during the installation process. The system provides the option of a "silent install", which installs the program files to the user's system without being visible, and without requiring user intervention. The installer is told where to
5 install the product's files. While the user may choose to install the product in any directory location they want, the installer offers them a choice consistent with the product identity. Every product is placed in a sub-directory within the master directory. The OEM partner has the ability to provide a name for both the master directory and sub-directory into which the product is installed. Program group, or "folder", is the location in which the installer displays the product
10 if the user does not manually choose a different one. The system allows the OEM partner to customize the Default Program Group name. The OEM partner does not have the ability, however, to change the name or associated icons of the items within the group.

The system provides the ability to co-brand the software by providing prominent partner logo placement on the main screen within the software. In one embodiment, the logo placement
15 is in the upper left hand corner of the main screen, below the provider's logo. An example of the layout of the provider's logo and the partner logo are shown in FIG. 18. The client software provides URL links which can be defined by the OEM partner. Specifically, the client software allows URL links to be embedded within two areas of the main client screen, the provider's logo in the upper left hand corner of the main screen, and the partner logo on the main screen. The
20 system also provides a space within the postal indicium that is designated to display a logo or slogan of the OEM partner.

The system incorporates client server technology which enables the provider to provide OEM partners with data that tracks the postage usage of customers who are using that OEM's version of the client software. The client software embeds a unique OEM identifier within each
25 OEM version of the client software. Once a user has registered with the provider, that user is thereafter associated with the OEM that is identified within their client software. This association, as well as all tracking activities, are transparent to the user and require no additional intervention by the user. In the event that a user gets the client software through an Affiliate Partner's web site, the account number that a user is assigned will embed in it information that
30 identifies the source Affiliate Partner. Therefore, this account number is uploaded to the Postal Server, which occurs at the end of the Registration wizard. In the case of an affiliate partnership, the tracking number is extracted from a cookie that has been downloaded onto the users computer. The details concerning formatting and requirements of the cookies are covered in a separate document.

35 A change of Address wizard is designed to help a user through the process of changing either a physical or mailing address, and the meter license ramifications that may result. An exemplary process flow of the Change of Address wizard is shown in FIG. 19A. In block 1901, the Change of Address Screen #1 serves the purpose of welcoming the user to the wizard using

1 the text as shown in FIG. 19B. Selecting "Next>" advances the user to the next screen of the wizard. In block 1902, the Change of Address Screen #2 allows the user to enter a new mailing address and/or physical address. As shown in FIG. 19C, the controls used are the same as are used in the Addresses screen of the Getting Started wizard. The only difference is in the
5 introductory text. The client checks for a PO Box in the physical address fields. If a PO Box is provided, the error message indicates that a PO Box is not acceptable. These fields are preferably pre populated by default. In blocks 1903 and 1904, addresses are checked and in block 1905, the Change of Address Screen #23, shown in FIG. 19D, appears. This screen preferably serves the same purpose as the Submit screen of the Registration Wizard, and preferably uses the same
10 controls. One difference is that in this case, the only information that is populated is the address information that is provided in screen #2.

Change of Address Screen #4, shown in FIG. 19E appears when a change in the meter license is not required (i.e. if the physical address hasn't changed or if the physical address hasn't resulted in a changed LPO), as shown in blocks 1906 and 1907. In this event, in block 1910, the
15 server submits a 3601C form, and this screen appears to let the user know that the address has been successfully changed. The Change of Address Screen #5 (shown in FIG. 19F) educates the user about the process that needs to be undertaken in order to withdraw and reapply for a meter license. Selecting "Next>" prompts the user with a warning dialog box, as shown in FIG. 19G. If the user responses "Yes" to the warning, the meter is withdrawn, and "moved" is inserted into
20 the reason for withdrawal on the 3601 C form (see block 1913), and the mailing address that is provided at the beginning of this wizard is used for the mailing of the refund check. This withdrawal should not result in a "slot" becoming available for a brand new user, as this user will re-register momentarily and take the "slot" again. If the user enters "no", the wizard is canceled.

Change of Address Screen #6 notifies the user that their meter license has been withdrawn.
25 In addition, it prompts the user for a new user name and password. The controls used for this screen, shown in FIG. 19H, are the same as those used in the user name screen of the Getting Started wizard. The client verifies with the server that the user name is unique. The client also verifies that the password meets the preferred basic criterion for example, of 6 characters minimum, with at least 1 alphabetic character and 1 numeric character. Change of Address
30 Screen #7 (shown in FIG. 19I) lets the user know that the final step is to go through the Registration Wizard. Selecting "Next>" launches the Registration wizard with all known fields being pre populated. In addition, the wizard preferably should not check for an available "slot", since the users are just using their existing "slot".

In one embodiment, the system includes a dialog box, which can change payment
35 methods and be accessed from the Account screen. An exemplary interface for this screen is illustrated in FIG. 20A. This screen preferably has the same functionality as the Select Payment Method screen of the Getting Started wizard, but formatted into a dialog box format. This dialog box is dynamic. The Select Payment Method screen of the Getting Started wizard is also

1 dynamic. When the user first sees the dialog box, the only control that is available prompts the
user for a Payment Type (i.e. Visa, MasterCard, American Express, ACH). If the user selects any
of the credit card types, the screen dynamically builds to add the additional controls that are
required to extract credit card information, as shown in FIG. 20B. These controls are described
5 in the Getting Started wizard above. If the user selects ACH, then the screen builds dynamically
to contain controls that extract the ACH information that is necessary in order for the provider
to bill an account. The specifics on these controls are discussed within the Getting Started wizard
above, and are integrated into the dialog box setting, as shown in FIG. 20C.

10 In one embodiment, the system allows the user to change the service plan in which the
customer is participating. This is accomplished through several screens which have many of the
attributes of the Service Plan screens within the Getting Started wizard. This functionality is
accessed when the user selects "Change Service Plan" from the Accounts screen. Once the user
selects "Change Service Plan" from the Accounts screen, the Change Plan dialog box (shown in
FIG. 21A) appears which has controls that are similar to those found on Service Screen #7 in the
15 Getting Started wizard with one addition. Specifically, a line of text is added at the top of the
screen that displays the name of the Service Plan that the user is currently signed up for. Once
the user has selected "Ok" in the Change Plan dialog box, the Change Plan Contract dialog box,
shown in FIG. 21B, appears. This dialog box preferably uses the same controls as screen #8 in
the Getting Started wizard (described above), and displays the contract for the new service plan
20 that the user has selected.

If the user selects the "I Accept" radio button on the Change Plan Contract dialog box, and
then selects "Ok", the dialog box shown in FIG. 21C appears. The purpose of this dialog box is
to communicate to the user when the change will come into effect. Selecting "Ok" completes
the Change of Service Plan process. If the user selects the "I do NOT Accept" radio button on
25 the Change Plan Contract dialog box, and then selects "Ok", the dialog box of FIG. 21D appears.
This dialog box provides a warning to the user that unless the contract is accepted, the service
plan will not be changed. If the user selects the "Go Back" button, this dialog preferably closes
and the Change Plan Contract dialog should appear again. If the user selects the "Cancel" button,
the change of plans process is canceled.

30 FIG. 21E depicts a dialog box that allows users to inform the provider when their email
account names have been changed. This dialog box is accessible from the Account screen. The
edit box control on this screen allows the user to enter a new email address. If the user enters an
address and selects OK, the client uploads the new email address to the server. If the user selects
Cancel, the operation is canceled. A Change Password option in the Account Screen is provided.
35 The dialog box that is launched from this option is updated to reflect the password functionality
as defined in the Getting Started wizard. In one embodiment, the password screen requires a new
password type. The preferred requirements for the new password type are that the password be
at least 6 characters in length, have at least 1 alpha character, and at least 1 numeric character.

1 A password recovery function allows a user to get a new password in the event that it is
forgotten. This process does not require the user to interface with Customer Service. This
process relies upon the secret code or key word phrase that the user provided in Service Screen
#4 of the Getting Started (at the end of the Getting Started wizard, this keyword is uploaded to
5 the server and stored as part of the user's personal profile).

The initial login screen provides the interface whereby the users typically inputs their
passwords. If a user enters incorrect information, a message such as the one shown in FIG. 22A
appears. As an added measure of security, if the user enters incorrect information ten times, the
system keeps showing the user the above message even if the user enters the correct information.
10 The user is forced to close and re-open the client to try again (although they won't know this) or
contact Customer Support. If the user enters the information correctly, the confirmation message
shown in FIG. 22B is displayed. The "OK" button closes the client. If the user never receives
the email or the letter, they preferably have to repeat the process to have a new password sent out.
The Customer Support (CS) Manager is able to modify the text of the Reset Sample email by
15 going through normal operational email update procedures.

Once the user gets the temporary password, the user uses it to log in as normal. Once the
server verifies that the password is valid, an additional check is made to determine whether the
password that is provided is a temporary or long term password. If the password is a temporary
password, then the client software launches the change password dialog box, and does not allow
20 the box to be closed until the user enters the old password and a new one. A Message Log lists
a history of the messages that a user has received from the provider. This log is accessible from
the "Accounts" screen, and have the standard layout and capabilities of the other logs within the
client.

FIG. 23 is an exemplary interface for a Withdraw Meter dialog box. Reason for
25 withdrawal combo box allows the user to select a reason why he/she is withdrawing the meter.
The user can type in their own response or select from any of the following standard responses;
too expensive, difficulty connecting, too much lost postage due to printing mistake, no support
for windowed or pre-addressed envelope, incompatibility with other software, requires printing
of address and 'stamp' together, no longer have significant mail volume, poor customer support,
30 and the like. Future Products used combo box helps better understand why customers are
terminating the provider's service. Specifically, this control allows the user to indicate what
postal solution he/she will use in the future. The user can type in a response or select from the
following: regular stamps, postage meter, or alternative Internet Postage product. A prompt
appears in the combo box that reads "<type in or select one>", if the user chooses to type in a
35 response. Address fields define where the refund check will go. These fields are pre-populated
with the user's mailing address, but the user can make any desired changes to the address. Once
all of these fields are filled in, selecting the OK button submits a request to withdraw a meter to

1 the server. The server processes the appropriate withdrawal forms to the USPS on the user's
behalf.

5 A Postal Meter License wizard is also provided. This option within the Options screen
launches the new Registration wizard (which is a subset of the Getting Started wizard). The
specific screens that make up the Registration wizard are shown in the process flow of FIG. 24.
The screens numbers in the process flow of FIG. 24 refer to screens of FIGs. 10B-10O of the
Getting Started wizard portion of this document. In order to change an address, the user selects
the Change of Address wizard.

10 A Setup Digital Scales option is also provided. This new option launches the Setup
Digital Scale dialog box shown in FIG. 25A. This dialog box is used to select and configure
digital scales. In this dialog box, Select a Scale combo box allows the user to select from a list
of supported digital scales. This list checks for all scales that are supported, such as the
Weightronics™ digital scale. Select COM port combo box allows the user to select which COM
port the digital scale is attached to. The list includes all of COM ports on the user's system. Web
15 Link button links the user to provider's site. The test button runs a test to make sure that the
communication to the selected scale on the selected COM port is functional. If the test
successfully communicates with the scale, the dialog shown in FIG 25B appears. If the test is
unsuccessful, the dialog box shown in FIG. 25C appears. The system supports the calculation
of postal rates based upon zones. As a result, the system is able to support Express and Priority
20 mailings. The implications of zone based postage are discussed in the printing section of this
document.

Every "View History" dialog box adds print functionality, so that historical reports can
be printed. Specifically, the View Postage Purchase History, View Postage Printed History, and
View Messages History all add a Print button at the bottom of the screen. The number of events
25 that are printed is defined by the purge control, which also controls the number of items that are
displayed.

It will be recognized by those skilled in the art that various modifications may be made
to the illustrated and other embodiments of the invention described above, without departing
from the broad inventive scope thereof. It will be understood therefore that the invention is not
30 limited to the particular embodiments or arrangements disclosed, but is rather intended to cover
any changes, adaptations or modifications which are within the scope and spirit of the invention
as defined by the appended claims.

WHAT IS CLAIMED IS:

1. An on-line system for printing a value bearing item (VBI) comprising:
a client subsystem for interfacing with a user comprising;
a graphical user interface (GUI) for installing software for printing the VBI;
a GUI for registering the user in the system; and
a GUI for managing the printing of the VBI; and
a server subsystem capable of communicating with the client subsystem over a
computer network for authorizing the client subsystem to print the VBI.
2. The system of claim 1, wherein the VBI bears postage value.
3. The system of claim 1, wherein the VBI is a ticket.
4. The system of claim 1, wherein the VBI is one or more of a coupon, a currency, a
voucher, and a check.
5. The system of claim 1, wherein the client subsystem further comprises a GUI for
specifying a payment method.
6. The system of claim 1, wherein the client subsystem further comprises a GUI for
making changes to the user's information.
7. The system of claim 1, wherein the client subsystem further comprises a GUI for
displaying the user information including an account information.
8. The system of claim 7, wherein the account information includes an amount of
credit left in the account.
9. The system of claim 1, wherein the client subsystem further comprises a GUI for
specifying an address book from a plurality of address books so that the system can use the
address book to print addresses.
10. The system of claim 1, wherein the client subsystem further comprises a GUI for
entering a password so that the server subsystem can store the entered password and verify the
password.
11. The system of claim 1, wherein the server subsystem includes an address matching
module for verifying an address entered by the user.

12. The system of claim 1, wherein the GUI for installing software comprises of a GUI for the user to specify the type of connection to the computer network.

13. The system of claim 1, wherein the GUI for installing software comprises of a GUI for reporting error messages to the user.

14. The system of claim 1, wherein the GUI for installing software comprises of a GUI for canceling an installation process.

15. The system of claim 1, wherein the GUI for registering the user comprises of a GUI for entering user information.

16. The system of claim 1, wherein the GUI for registering the user comprises of a GUI for offering the user a plurality of service plans and for selecting by the user a service plan of choice.

17. The system of claim 1, wherein the GUI for registering the user comprises of a GUI for reporting error messages to the user.

18. The system of claim 1, wherein the GUI for registering the user comprises of a GUI for canceling a registration process.

19. The system of claim 1, wherein the GUI for managing the printing comprises of a GUI for displaying a graphical image of the VBI.

20. The system of claim 1, wherein the GUI for managing the printing comprises of a first GUI for printing a quality assurance VBI.

21. The system of claim 20, further comprising a second GUI for displaying selectable choices of a printed quality assurance VBI.

22. The system of claim 1, wherein the GUI for managing the printing comprises of a GUI for troubleshooting selected printing options.

23. The system of claim 1, wherein the GUI for managing the printing comprises of a GUI for providing envelope options.

24. The system of claim 1, wherein the GUI for managing the printing comprises of a GUI for providing label options.

1 25. The system of claim 1, wherein the GUI for managing the printing comprises of a GUI for providing postage options.

5 26. The system of claim 1, wherein the GUI for managing the printing comprises of a GUI for reporting error messages to the user.

 27. The system of claim 1, wherein the GUI for managing the printing comprises of a GUI for canceling a print process.

10 28. The system of claim 5 further comprising a GUI for displaying credit card information fields to be filed by the user when the user specifies a credit card for the payment method.

15 29. An interactive online postage printing system comprising:
 an installation wizard including a graphical user interface (GUI) for downloading and installing software for postage printing from a server connected to a computer network;
 a registration wizard including a GUI for facilitating the registration of a user with the system; and
 a printing wizard including a GUI for facilitating printing of a postage indicium.

20 30. The system of claim 29, wherein the registration wizard includes a GUI for specifying a payment method.

25 31. The system of claim 30 further comprising a GUI for displaying credit card information fields to be filled by the user.

 32. The system of claim 29, wherein the registration wizard includes a GUI for making changes to the user's information.

30 33. The system of claim 29, wherein the registration wizard includes a GUI for displaying the user information including an account information.

 34. The system of claim 33, wherein the account information includes an account balance.

35 35. The system of claim 29, wherein the installation wizard includes a GUI for specifying an address book so that the system can use the address book to print addresses.

1 36. The system of claim 29, wherein the registration wizard includes a GUI for entering a password so that the server can store the entered password and verify the password.

5 37. The system of claim 29, wherein the server includes an address matching database for verifying an address entered by the user.

 38. The system of claim 29, wherein the installation wizard includes a GUI for the user to specify the type of connection to the computer network.

10 39. The system of claim 29, wherein the installation wizard includes a GUI for reporting error messages to the user.

 40. The system of claim 29, wherein the installation wizard includes a GUI for canceling an installation process.

15 41. The system of claim 29, wherein the registration wizard includes a GUI for entering user information.

20 42. The system of claim 29, wherein the registration wizard includes a GUI for offering the user a plurality of service plans and selecting by the user a service plan of choice.

 43. The system of claim 29, wherein the registration wizard includes a GUI for reporting error messages to the user.

25 44. The system of claim 29, wherein the printing wizard includes a GUI for displaying a graphical image of a sample postage on an envelope.

 45. The system of claim 29, wherein the printing wizard includes a first GUI for printing a quality assurance VBI.

30 46. The system of claim 45, further comprising a second GUI for displaying selection choices of the shape of a printed quality assurance postage sample.

35 47. The system of claim 29, wherein the printing wizard includes a GUI for troubleshooting selected printing options.

 48. The system of claim 29, wherein the printing wizard includes a GUI for providing envelope options.

1 49. The system of claim 29, wherein the printing wizard includes a GUI for providing label options.

5 50. The system of claim 29, wherein the printing wizard includes a GUI for providing postage options.

 51. The system of claim 29, wherein the printing wizard includes a GUI for reporting error messages to the user.

10 52. A method for printing a value bearing item (VBI) over a computer network having a client system and a server system, the method comprising the steps of:
 displaying a first GUI by the client system for registering a user;
 establishing communication with the server via the network;
 entering user information in the first GUI; and
15 communicating the entered user information to the server;

 53. The method of claim 52 further comprising the steps of:
 displaying a second GUI by the client system including printing options for managing the printing of the VBI;
20 selecting one or more printing options from the second GUI; and
 printing the VBI according to the selected one or more printing options.

 54. The method of claim 53, wherein the step of printing the VBI comprises printing a postage value.

25 55. The method of claim 53, wherein the step of printing the VBI comprises printing a ticket.

30 56. The method of claim 53, wherein the step of printing the VBI comprises printing one or more of a coupon, a currency, a voucher, and a check.

 57. The method of claim 52 further comprising displaying a third GUI for installing software for printing the VBI.

35 58. The method of claim 52, wherein the step of displaying a first GUI comprises displaying a GUI for specifying a payment method.

 59. The method of claim 52, wherein the step of displaying a first GUI comprises displaying a GUI for making changes to the user's information.

1 60. The method of claim 52, wherein the step of displaying a first GUI comprises displaying a GUI for displaying the user information including an account information.

5 61. The method of claim 60, wherein the account information includes an account balance.

 62. The method of claim 52, further comprising the step of displaying a third GUI for specifying an address book so that the system can use the address book to print addresses.

10 63. The method of claim 52, further comprising the step of displaying a third GUI for entering a password so that the server system can store the entered password and verify the password.

15 64. The method of claim 52, further comprising the step of verifying an address by the server system entered by the user.

 65. The method of claim 52, wherein the step of displaying a first GUI comprises displaying a GUI for offering the user a plurality of service plans and selecting by the user a service plan of choice.

20 66. The method of claim 52, wherein the step of displaying a first GUI comprises displaying a GUI for reporting error messages to the user.

25 67. The method of claim 52, wherein the step of displaying a first GUI comprises displaying a GUI for canceling a registration process.

 68. The method of claim 53, wherein the step of displaying a second GUI comprises displaying a GUI for displaying a graphical image of the VBI.

30 69. The method of claim 53, wherein the step of displaying a second GUI comprises displaying a QA GUI for printing a quality assurance VBI.

 70. The method of claim 69, further comprising displaying a third GUI for displaying selectable choices of the shape of a printed sample VBI.

35 71. The method of claim 53, wherein the step of displaying a second GUI comprises displaying a GUI for troubleshooting selected printing options.

1 72. The method of claim 53, wherein the step of displaying a second GUI comprises displaying a GUI for providing envelope options.

5 73. The method of claim 53, wherein the step of displaying a second GUI comprises displaying a GUI for providing label options.

 74. The method of claim 53, wherein the step of displaying a second GUI comprises displaying a GUI for providing postage options.

10 75. The method of claim 53, wherein the step of displaying a second GUI comprises displaying a GUI for reporting error messages to the user.

 76. The method of claim 53, wherein the step of displaying a second GUI comprises displaying a GUI for canceling a print process.

15 77. The method of claim 52, further comprising the step of displaying a second GUI for the user to withdraw the user's account.

20 78. The method of claim 52, further comprising the step of displaying a second GUI for communicating a message to the user.

 79. The method of claim 53, wherein the step of selecting one or more printing options comprises the steps of:

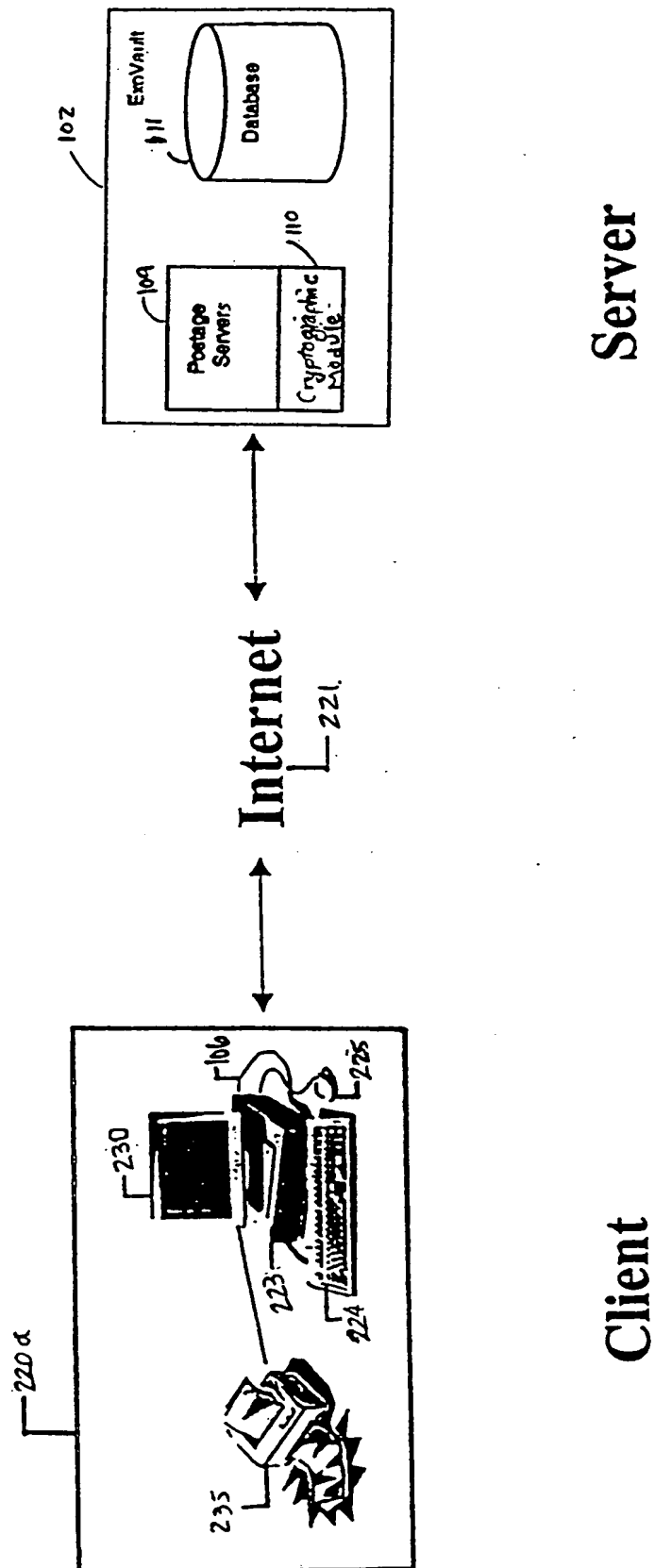
 prompting the user to place an envelope in a printer;

25 displaying a plurality of patterns, wherein only one of the plurality of patterns completely prints onto the envelope fed through the printer;

 selecting one of the plurality of displayed patterns based upon which pattern appears to the user; and

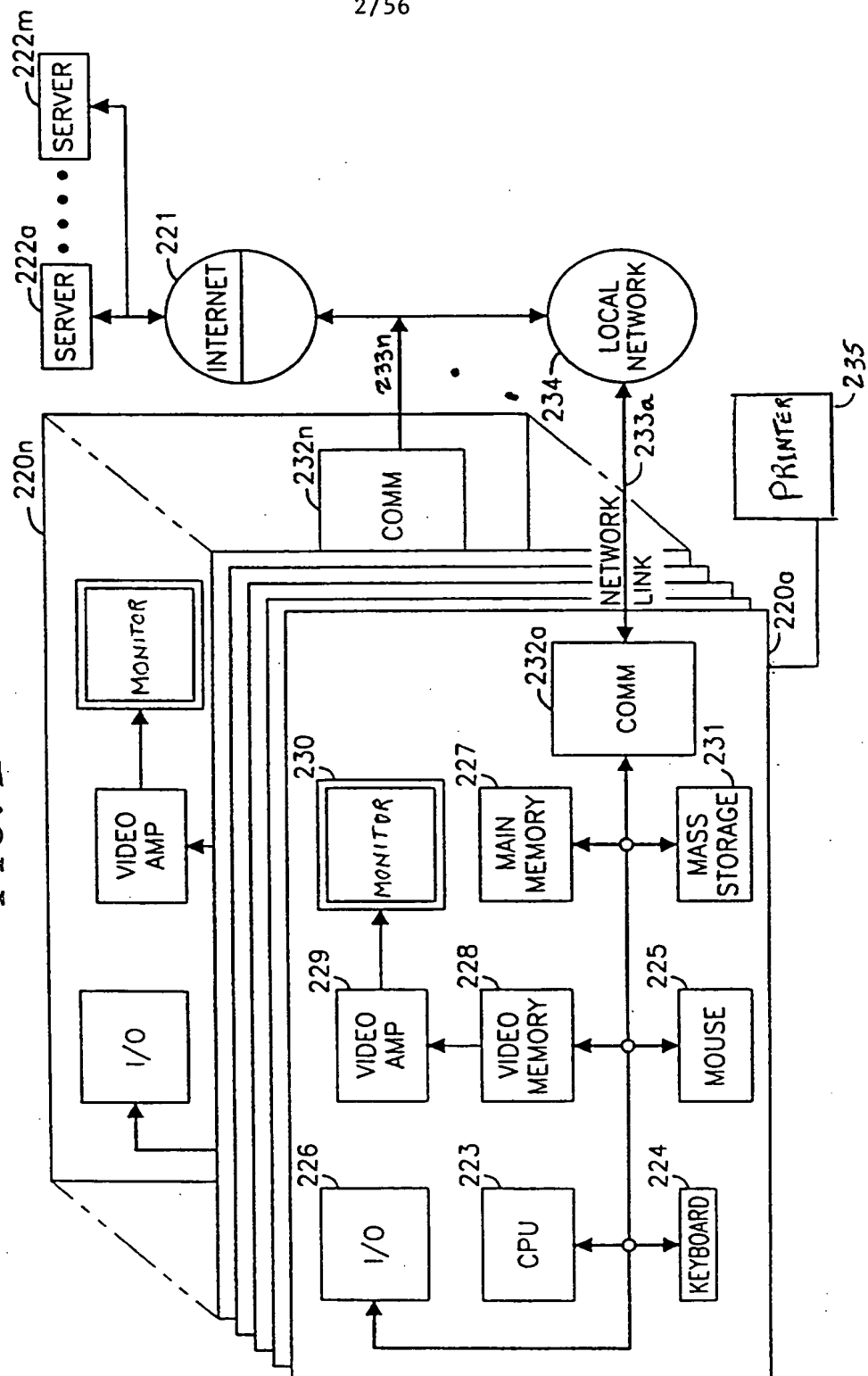
30 ascertaining if the printer feeds envelopes from the top, center, or bottom based on the selected pattern.

FIG. 1

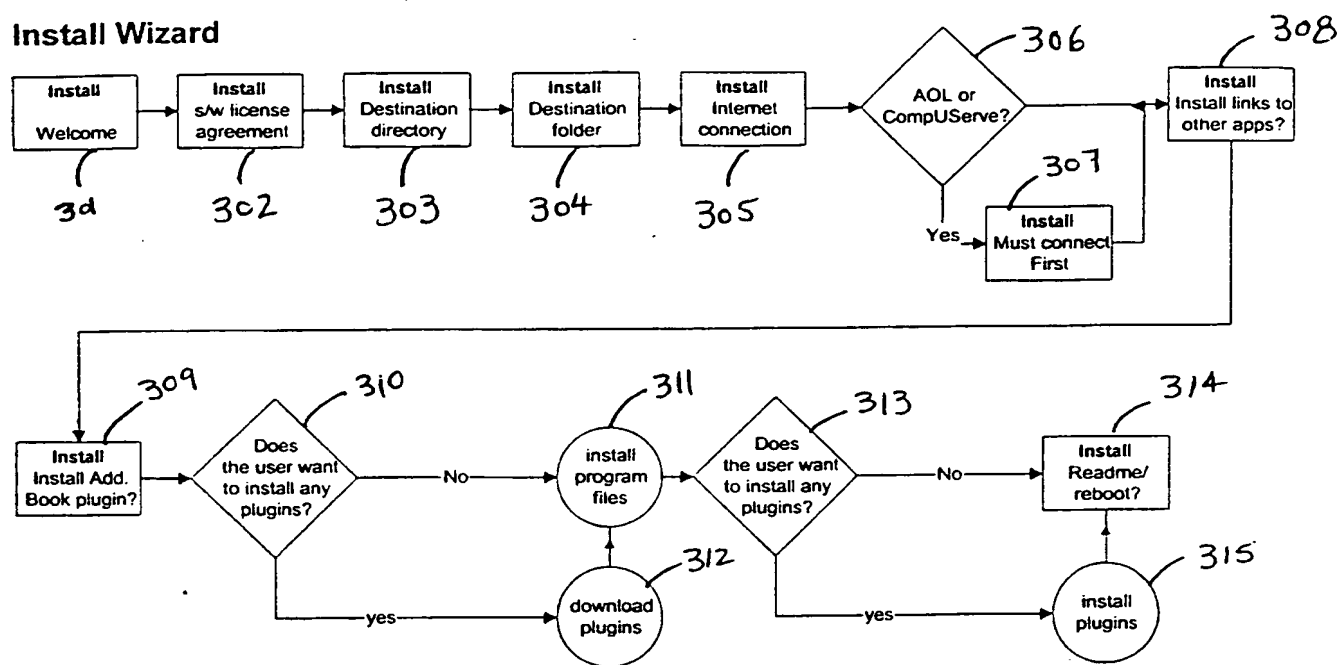


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FIG. 2



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Install Wizard**FIG. 3**

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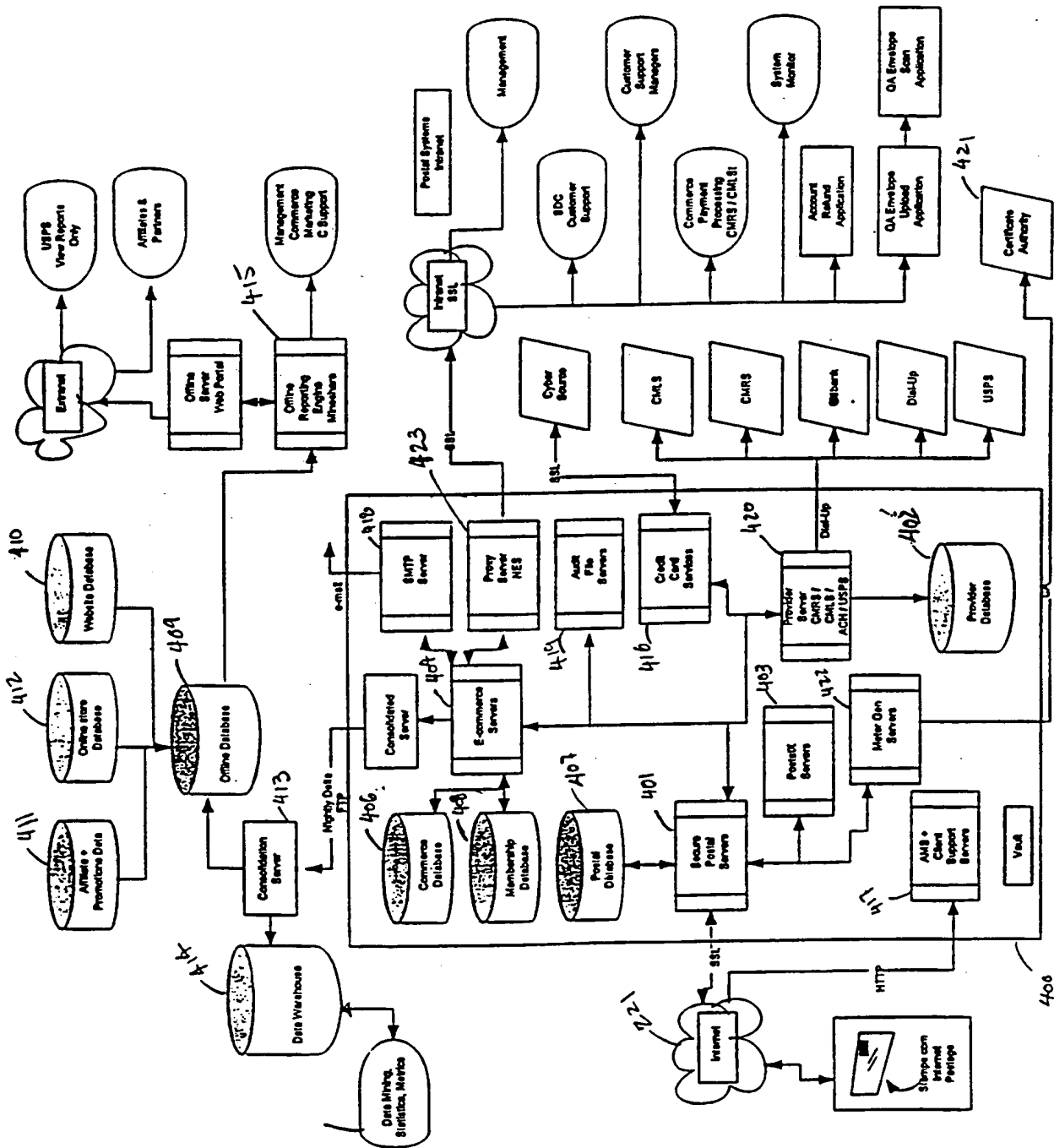


FIG. 4

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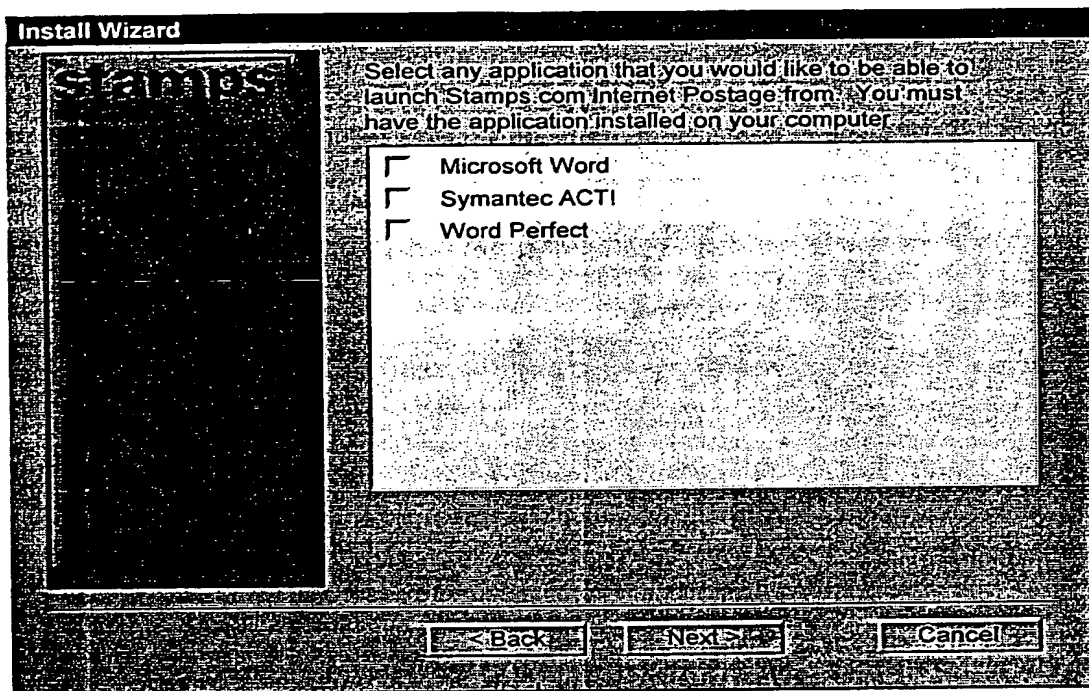


FIG.5A

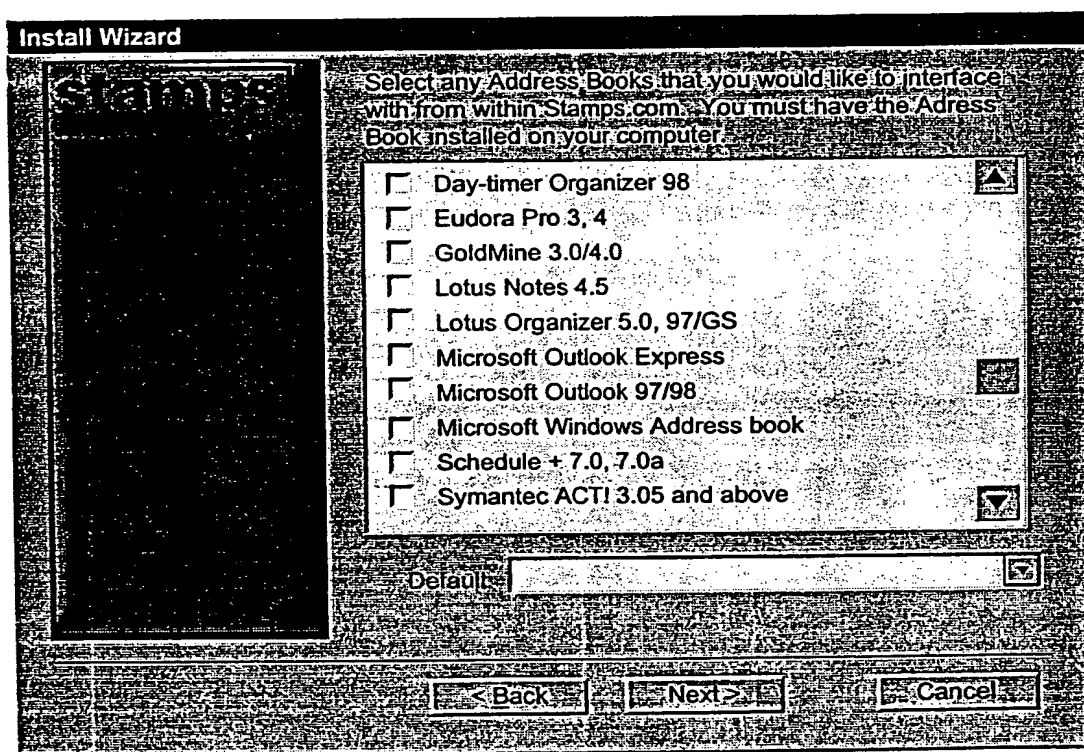


FIG.5B

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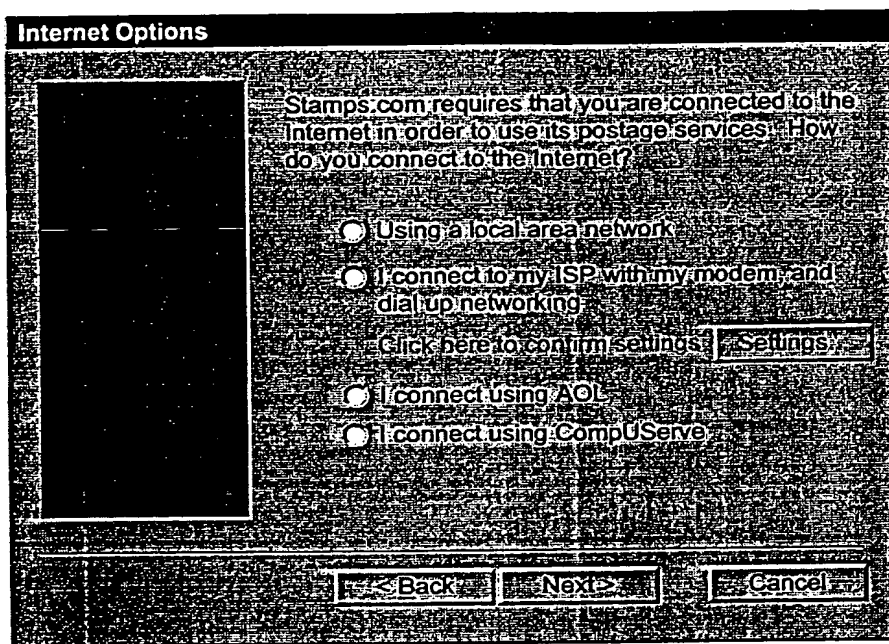


FIG. 6A

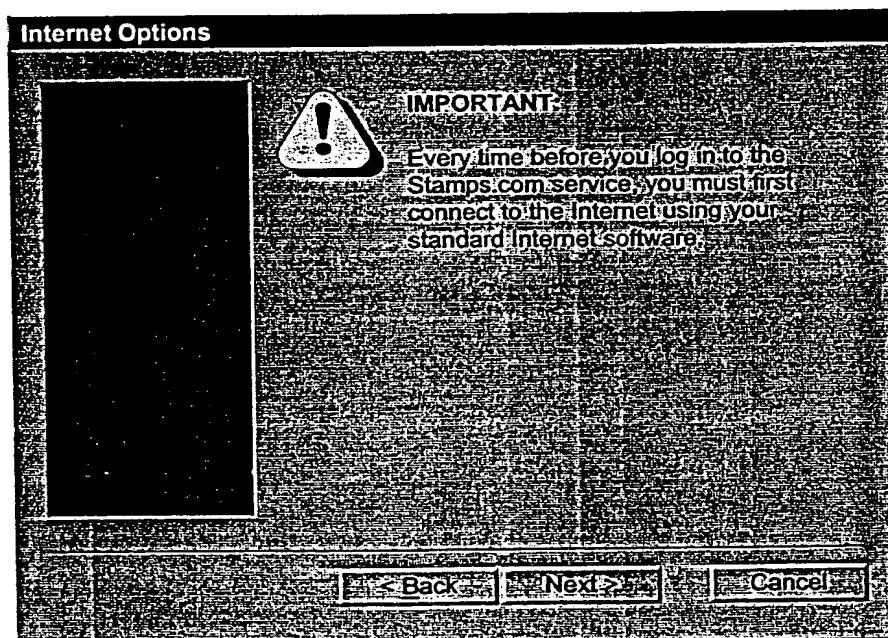


FIG. 6B

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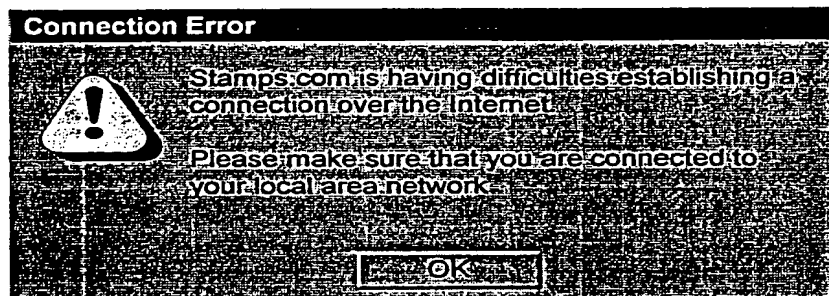


FIG. 6C

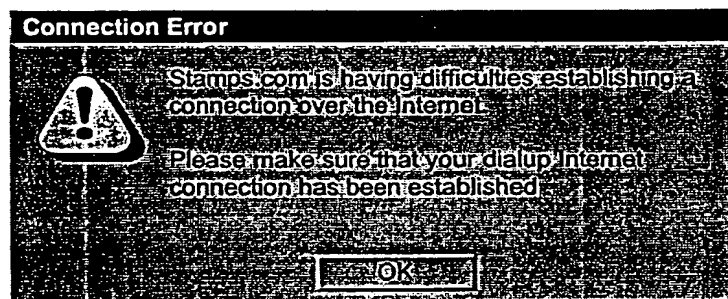


FIG. 6D

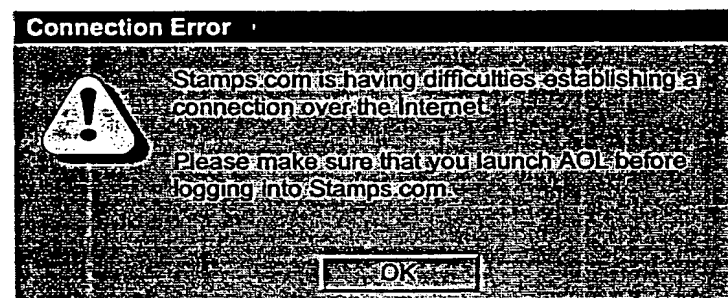


FIG. 6E

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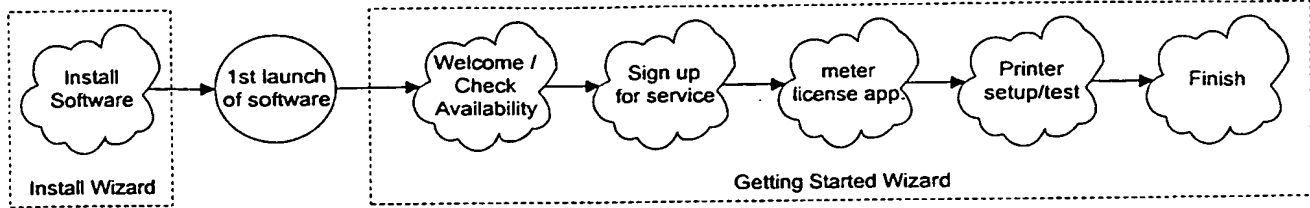


FIG.7A

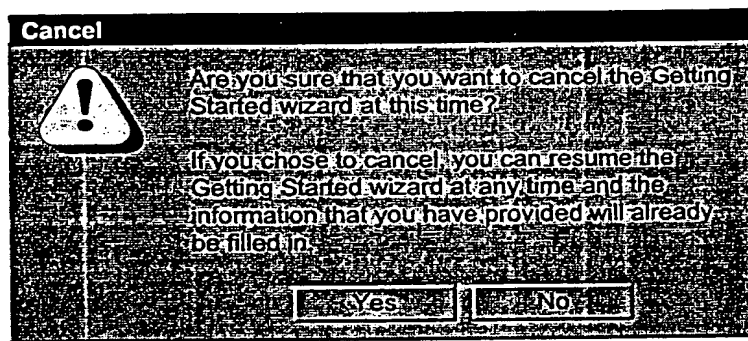
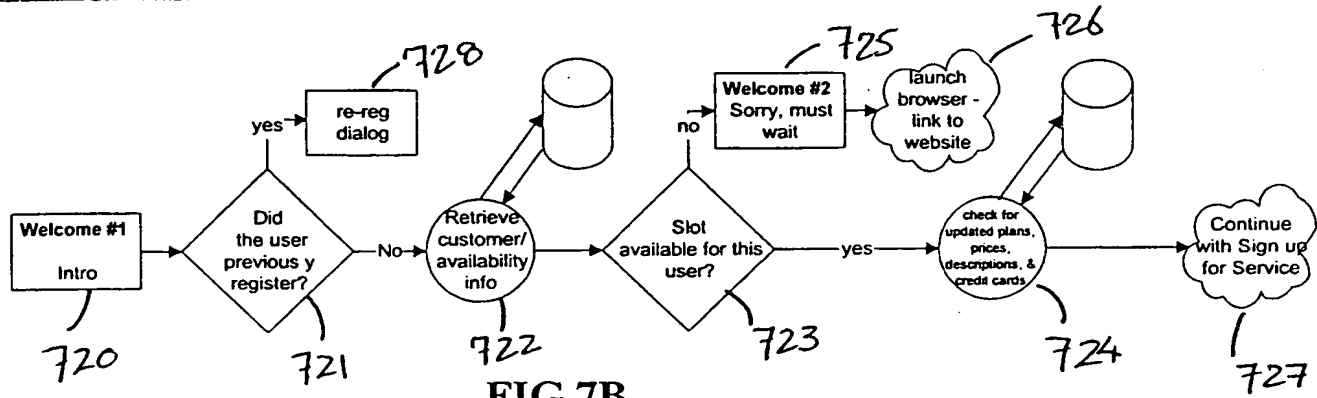


FIG.7D

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Getting Started Wizard - Welcome**FIG. 7B**

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Getting Started Wizard - Sign up for Service

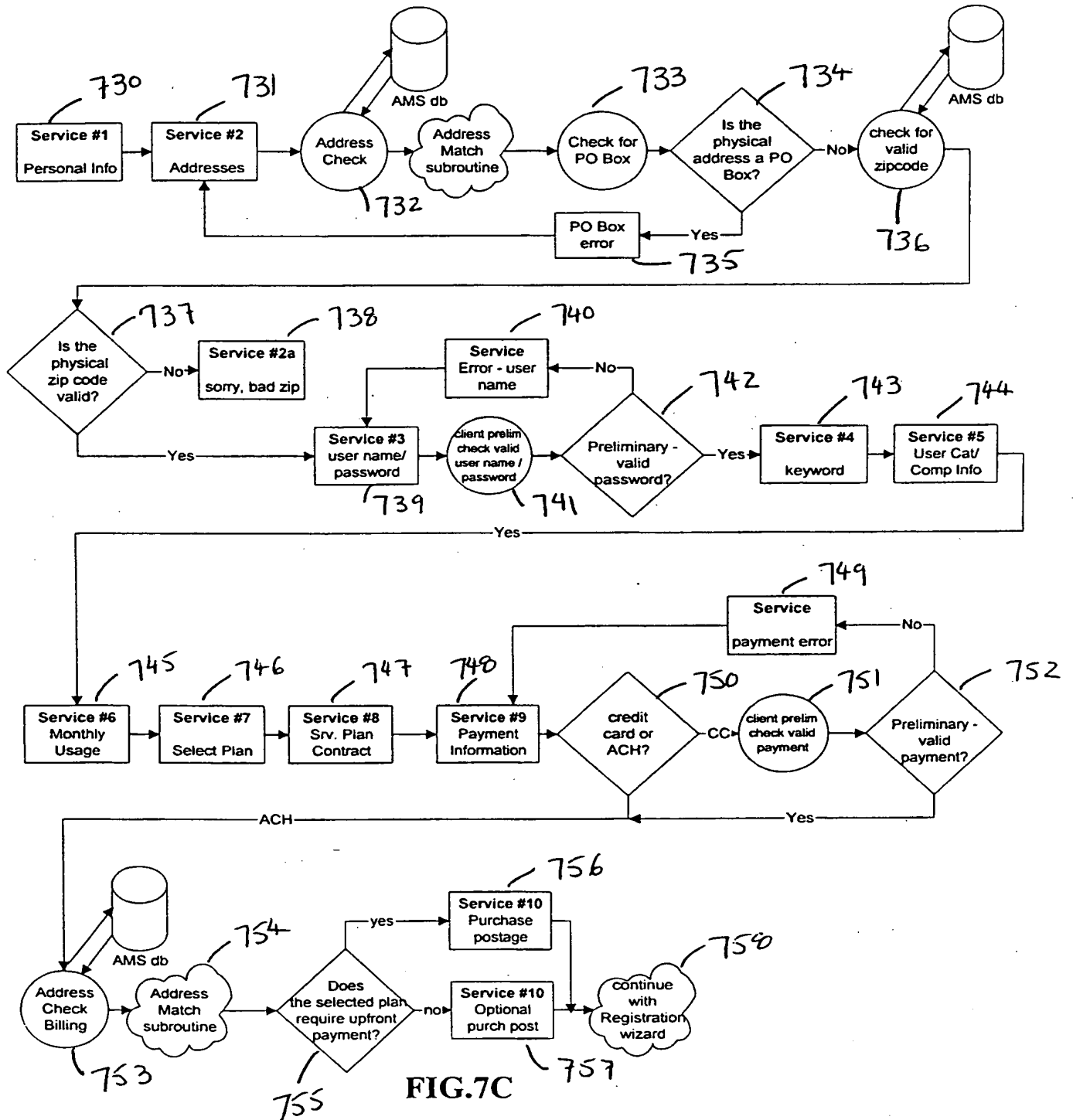
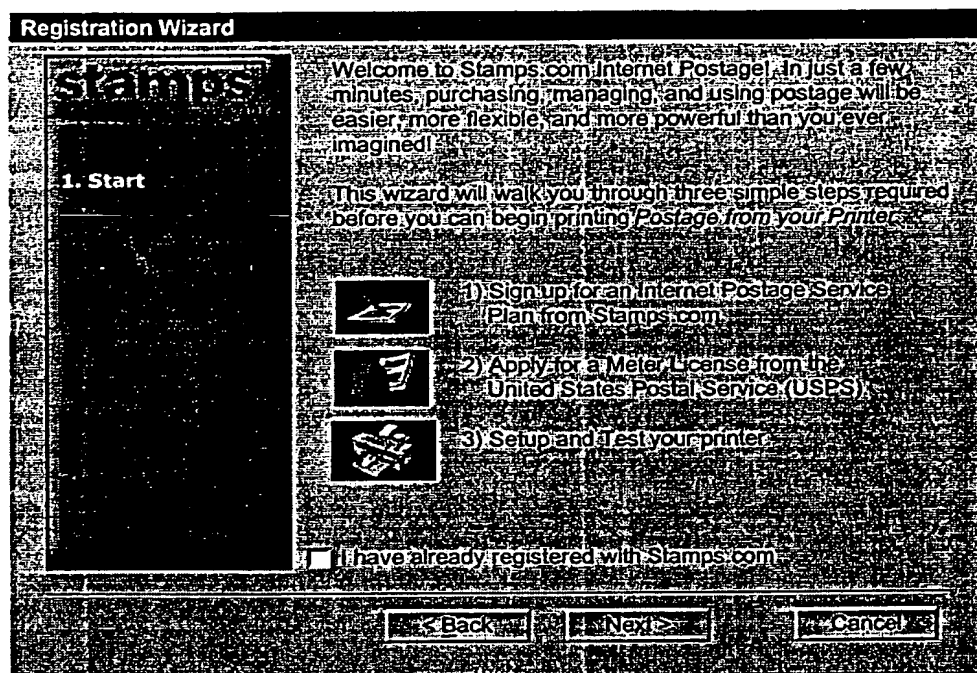


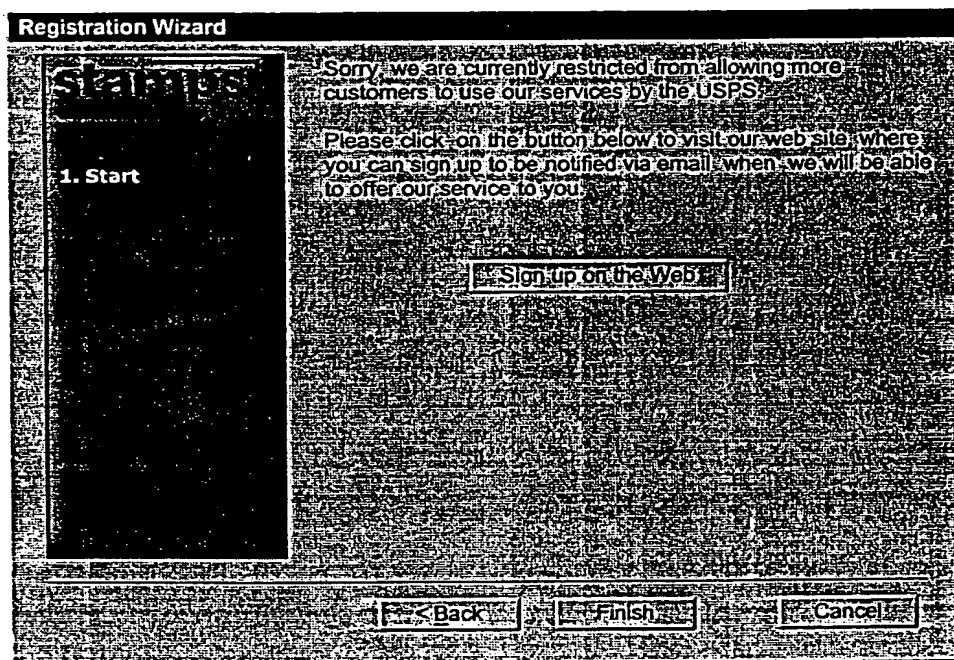
FIG.7C

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Welcome #1
Intro 1

FIG. 8A



Welcome #2
Sorry, must
wait

FIG. 8B

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Registration Wizard

Stamps.com **Service Sign Up**

First, you will need to register with Stamps.com and sign up for an Internet Postage Service Plan.

Please fill in the personal information on the following pages for use in this registration process.

First Name: Middle Initial:

Last Name:

Phone: Fax:

Email:

Stamps.com will send all invoices via email, so please be sure this email account is one you check often.

☒ Send me information about Stamps.com and its partners.

Service #1
Personal info

FIG. 9A

Registration Wizard

Stamps.com **Service Sign Up**

Please enter the physical address where this computer is located.

Address:

City:

State: Zip:

Please provide your mailing address.

☐ Use physical address

Address:

City:


State: Zip:

Service #2
Addresses

FIG. 9B

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Registration Wizard



2. Register with Stamps.com

Sorry, Internet Postage is not yet available in your zip code.


Please click on the button below to visit our web site, where you can sign up to be notified via email when we will be able to offer our service to you.

[Sign up on the Web](#)



Service #2a
Sorry, bad zip

FIG. 9C

Registration Wizard



2. Register with Stamps.com

Every time that you log into the Stamps.com service, you will need to provide a unique user name and password in order to protect your account. Enter a user name.

User Name:

Please select a password. Your password must be at least 6 characters in length, and contain at least one letter and one number.

Password:


Retype Password:

Service #3
User name/
pass

FIG. 9D

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Registration Wizard

stamps.com  **Service Sign Up**

2. Register with Stamps.com

Please select one of the questions below that only you would know the answer to, and then enter an answer in the form of either a word or phrase.

This secret code will be used to retrieve your password if you ever lose it.


Select a question:

Enter your secret code response:

Service #4
enter key
word

FIG. 9E

Registration Wizard

stamps.com  **Service Sign Up**

2. Register with Stamps.com

In order to help Stamps.com better service your unique postage needs, please supply us with the following information.

Select which category best describes how you will use this service.

☒ Personal / Individual use
☐ Home office (Corporate Work, Telecommuting)
☐ Home-Based Business
☐ Office-Based Business

Enter your company information below.

Company Name:

of Employees:


Industry SIC Code:

Service #5
User cat/
comp. info

FIG. 9F

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Registration Wizard

stamps.com  **Service Sign Up**

2. Register with Stamps.com

On average, how much do you spend on postage each month?
(Postage includes USPS classes of mail - First Class, Priority, & Express - but does not include non-USPS overnight / package delivery services such as FedEx or UPS.)

\$

Do you currently lease or rent a traditional postage meter?

☐ Yes ☐ No


Estimate the percentage of each type of mail that you send.

100	% Letters (standard envelopes)
0	% Letters (window / preprinted envelopes)
0	% Flats (magazines, unfolded letters)
0	% Parcels (boxes)

Service #6
monthly
usage

FIG. 9G

Registration Wizard

stamps.com  **Service Sign Up**

2. Register with Stamps.com

Stamps.com offers a variety of Internet Postage Service Plans from which you can choose. Each plan offers different benefits, and each has a different convenience fee structure.

Select a Service Plan:

Service Plan Descriptions:

Service #7
Select plan

FIG. 9H

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Registration Wizard

stamps.com **Service Sign Up**

1. Start

2. Register with Stamps.com

Please read the Service Plan contract below and indicate whether or not you accept its terms.


☐ I Accept ☐ I do NOT Accept

< Back **Next >** **Cancel**

Service #8
Srv Plan
agreement

FIG. 9I

Service Plan Contract


 You cannot complete the Registration process unless you agree to the terms of the Service Plan Contract. Would you like to Go Back and review the contract again, or cancel the change of Service Plans?

Go Back **Cancel**

FIG. 9J

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Registration Wizard

stamps.com  **Service Sign Up**

Please select a means of payment to be used for both the purchase of postage and for the payment of convenience fees


Payment Type:

2. Register with Stamps.com

Service #9
payment info
nothing selected
mode

FIG. 9K

Registration Wizard

stamps.com  **Service Sign Up**

Please select a means of payment to be used for both the purchase of postage and for the payment of convenience fees

Payment Type:

Cardholder Name:

Card #:

Exp. Date: month: year:

Please provide your billing address for this account

☐ Use Mailing address

Address:

City:

State: Zip:

2. Register with Stamps.com

Service #9 a
payment info
credit card
selected mode

FIG. 9L

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Registration Wizard

stamps.com Service Sign Up

Please select a means of payment to be used for both the purchase of postage and for the payment of convenience fees.

Payment Type:

Name on Acct:

ABA Routing #:

Account #:

Bank Name:

Account Type: ☐ Checking ☐ Savings

Service #9b
payment info
ACH selected mode

FIG. 9M

Registration Wizard

stamps.com Service Sign Up

Before you can begin printing postage, you need to have a balance of postage in your account.

How much postage would you like to purchase at this time?

☐ \$ 10

☐ \$ 25

☐ \$ 50

☐ \$ 100

☐ \$ 200

☐ Other

Service #10
purchase
postage

FIG. 9N

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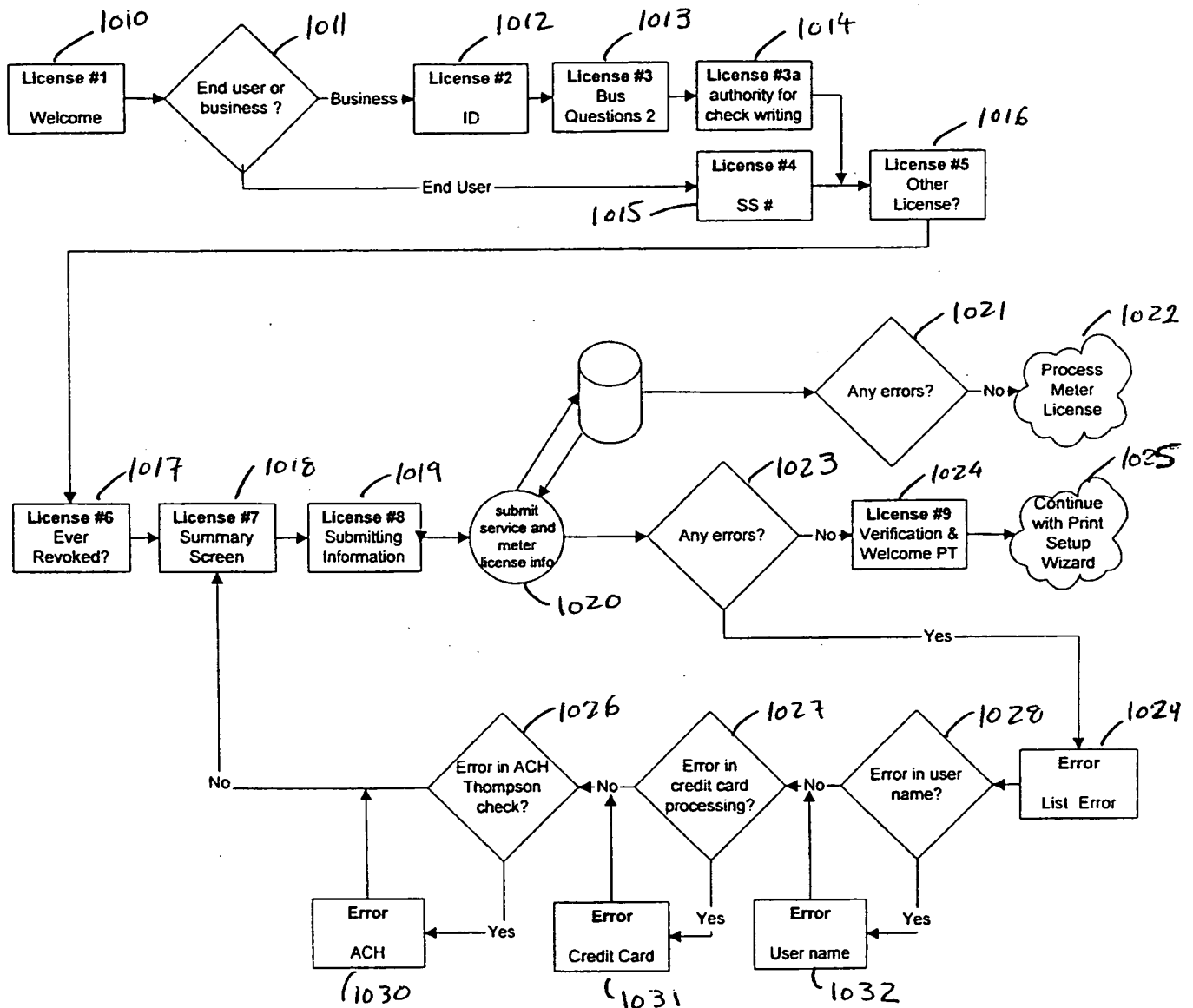
Getting Started Wizard: Registration Wizard component

FIG. 10A

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Registration Wizard

UNITED STATES POSTAL SERVICE **Meter License Application**

In the next step, this wizard will assist you in submitting a Meter License application with the USPS.

This process generates an official USPS Meter License Application form and must therefore be responded to with complete accuracy.

3. Apply for a postal meter

License #1
Verification &
Welcome ML

FIG. 10B

Registration Wizard

UNITED STATES POSTAL SERVICE **Meter License Application**

Enter a business identification number for your company. First select a type of business identification number, and then enter that number for your company.

☐ Tax ID #

☐ EIN

☐ Social Security #

3. Apply for a postal meter

License #2
license ID

FIG. 10C

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Registration Wizard

UNITED STATES POSTAL SERVICE

Meter License Application

3. Apply for a postal meter

Does your business anticipate metered mail at discount rates?

☐ Yes ☐ No

Does your business have an authorization to use permit imprints at this or any other Post Office?

☐ Yes ☐ No

Does your business prepare and/or mail for other (third) parties?

☐ Yes ☐ No

< Back Next > Cancel

License #3
Bus. questions 2

FIG. 10D

Registration Wizard

UNITED STATES POSTAL SERVICE

Meter License Application

3. Apply for a postal meter

Are you a corporate officer or a person who has express authority within your corporation/business to sign checks?

☐ Yes ☐ No

Please enter the following information about a person with such authority:

First Name: Middle Initial:

Last Name:

Title:

Phone:

< Back Next > Cancel

License #3a
authority for
check writing

FIG. 10E

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Registration Wizard

UNITED STATES POSTAL SERVICE

Meter License Application

The USPS requires that you provide your Social Security number in order to process your Meter License request.

Social Security Number

3. Apply for a postal meter

Back Next Cancel

License #4
Social Security #

FIG. 10F

Registration Wizard

UNITED STATES POSTAL SERVICE

Meter License Application

Do you currently hold any other USPS meter licenses at this or any other Post Office?

☒ Yes ☐ No

Please enter the other USPS meter license you hold:

License Number License Number

License Number License Number

3. Apply for a postal meter

Back Next Cancel

License #5
other license?

FIG. 10G

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Registration Wizard

UNITED STATES POSTAL SERVICE

Meter License Application

Have you ever had a postage meter license revoked?

☒ Yes ☐ No

Please provide specific details. Are you required to provide a postage meter license number, date of revocation, and name of the issuing post office?

3. Apply for a postal meter

Back Next Cancel

License #6
ever revoked?

FIG. 10H

Registration Wizard

UNITED STATES POSTAL SERVICE

Meter License Application

Before submitting your Meter License Application please review the answers you provided for accuracy. The USPS requires that all information submitted is accurate.

If any information is incorrect, select the Back button to return to the appropriate screen and change the information.

Applicant's Name: mark a. ellis

Physical Address:
28341 LA BAJADA
LAGUNA NIGUEL, CA 92677-7057

Mailing Address:
28341 LA BAJADA
LAGUNA NIGUEL, CA 92677-7057

☐ I verify that the information shown is truthful and accurate.

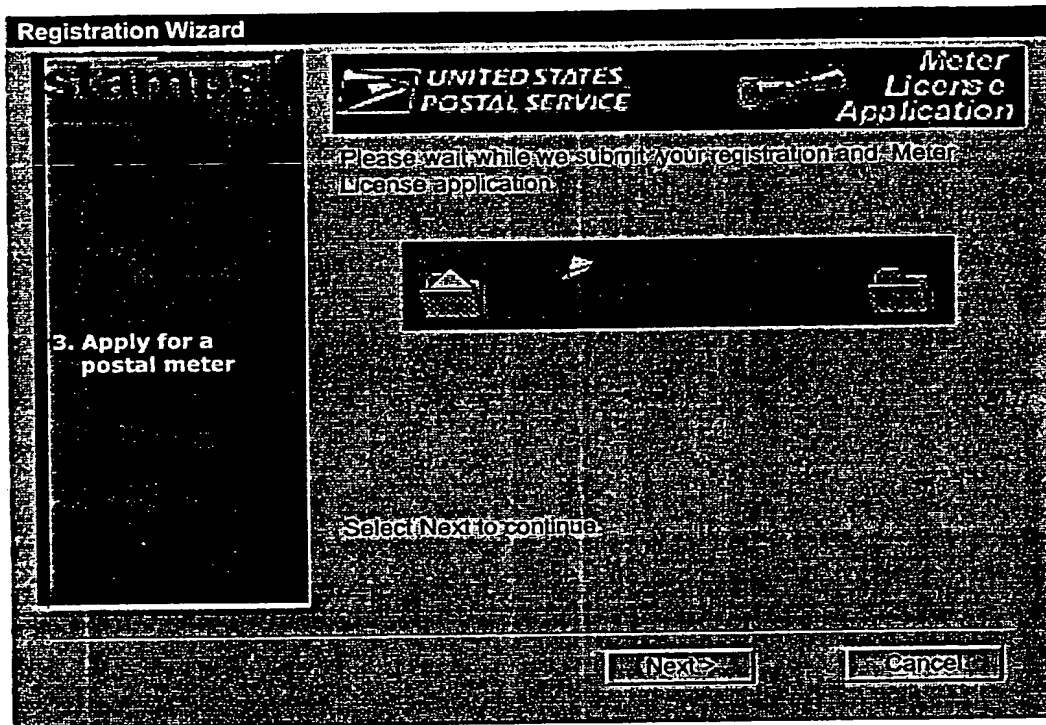
3. Apply for a postal meter

Back Submit Now Cancel

License #7
Submit

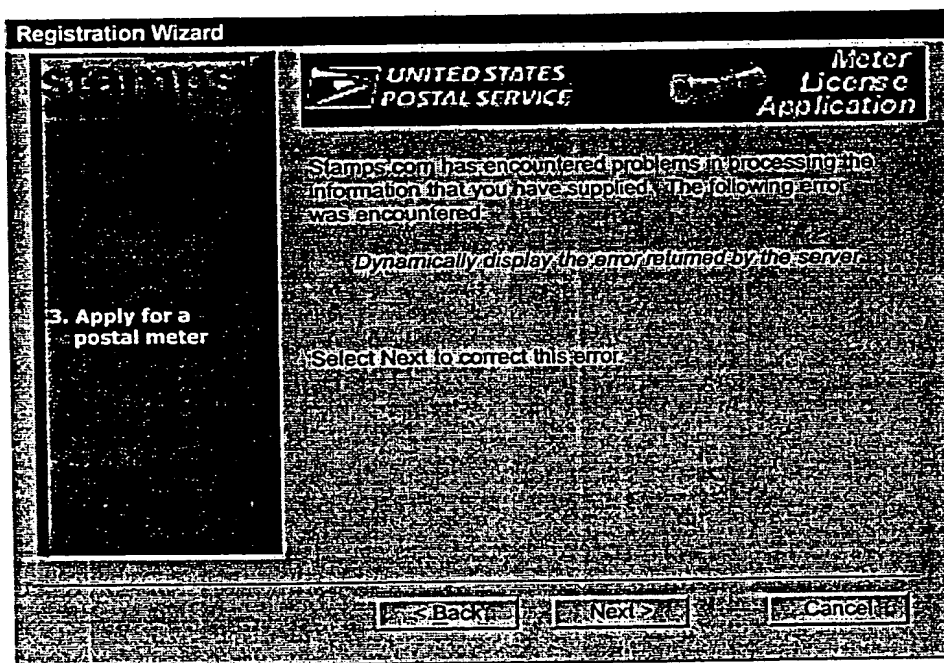
FIG. 10I

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License #8
submitting
information

FIG. 10J



Error Display

FIG. 10K

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Registration Wizard

Stamps **Service Sign Up**

The username that you entered is not available, since it's already being used by another Stamps.com customer. Please enter another username, or select the Suggest button and Stamps.com will provide you with a unique username.

User Name:

Error Dialog
User name

FIG. 10L

Registration Wizard

Stamps **Service Sign Up**

Please select a means of payment to be used for both the purchase of postage and for the payment of convenience fees.

Payment Type: ☒

Name on Acc:

ABA Routing:

Account:

Bank Name:


Account Type: ☐ Checking ☐ Savings

Error Dialog
Bad ACH

FIG. 10M

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Registration Wizard

stamps  **Service Sign Up**

Please select a means of payment to be used for both the purchase of postage and for the payment of convenience fees.

Payment Type: ☐

Cardholder Name:

Card #:

Exp. Date: ☐ ☐ Year: ☐

Please provide your billing address for this account.

☐ Use Mailing address

Address:


City:

State: ☐

Error Dialog
credit card
rejected

FIG. 10N

Registration Wizard

UNITED STATES POSTAL SERVICE  **Meter License Application**

Your Meter License Application has been successfully submitted.

This license should be processed in approximately xxxxxx hours. At this time, you will be able to use all of the functionality available from Stamps.com.

The next step is test your printer and determine whether or not your printer can print postage that meets USPS requirements. Select Next and the wizard will assist you in this process.

License #9
Verification &
Welcome PT

FIG. 100

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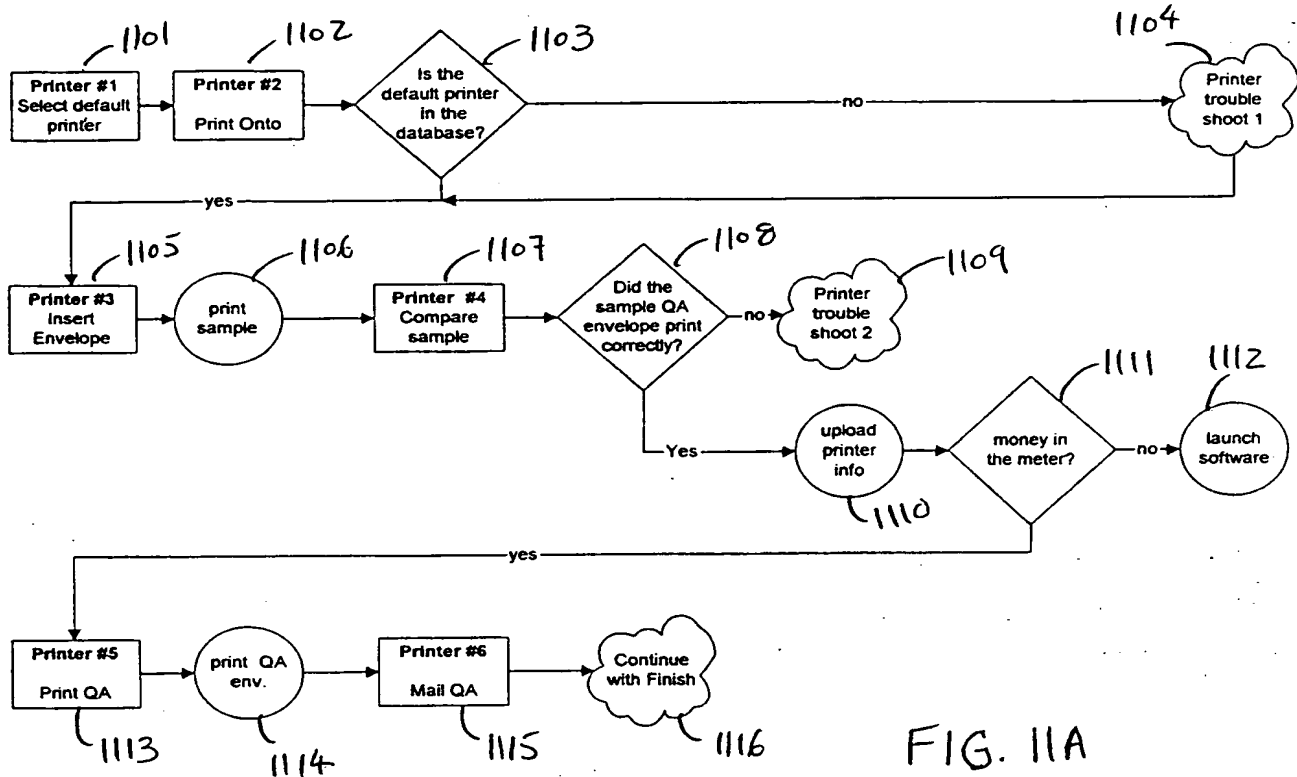
Getting Started Wizard - Print Setup Wizard component

FIG. 11A

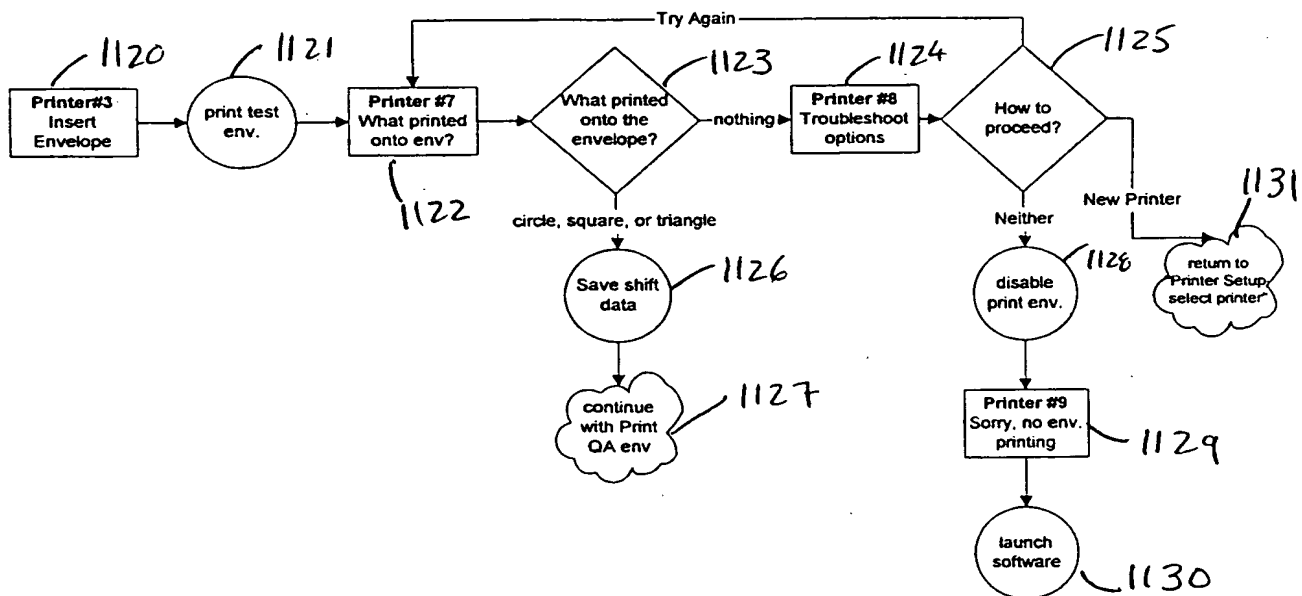
Getting Started Wizard - Print Config Wizard component

FIG. 11B

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Stamps.com Internet Postage Registration

UNITED STATES POSTAL SERVICE

Please select a default printer to be used for printing postage.

Default Printer:

In order to ensure that the selected printer is able to print in accordance with USPS requirements, we will need to print one or more sample pieces of postage as well as a real piece of postage.

Select Next to continue.

4. Test printer

Back Next Cancel

Printer #1
Select Default
Printer

FIG. 11C

Stamps.com Internet Postage Registration

UNITED STATES POSTAL SERVICE

Select the size of the envelopes that the postage will be printed onto.

Print Onto:

Would you like the return address to be printed on these envelopes? (select no if you are using envelopes with a pre-printed return address)

☐ yes

☐ no

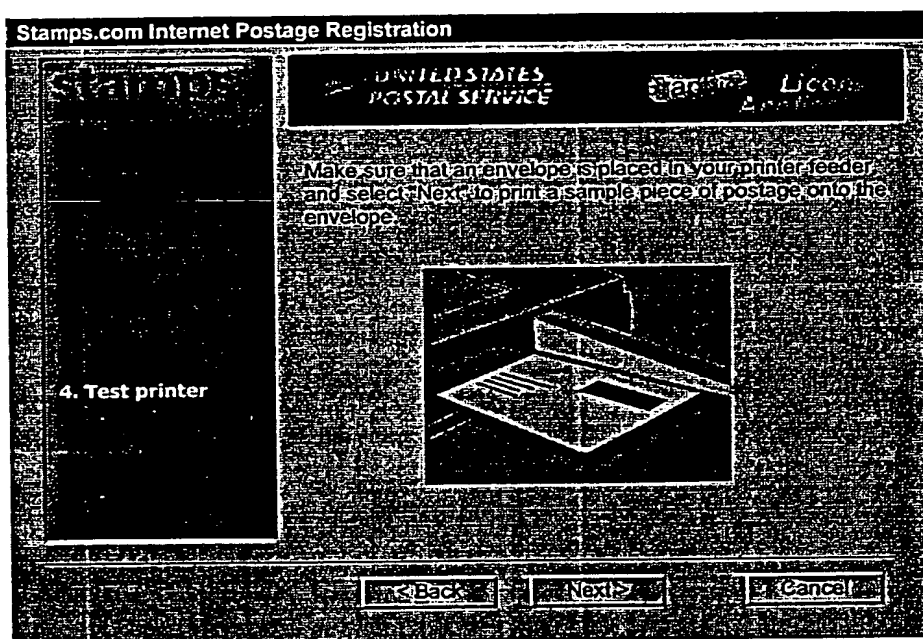
4. Test printer

Back Next Cancel

Printer #2
Print Onto

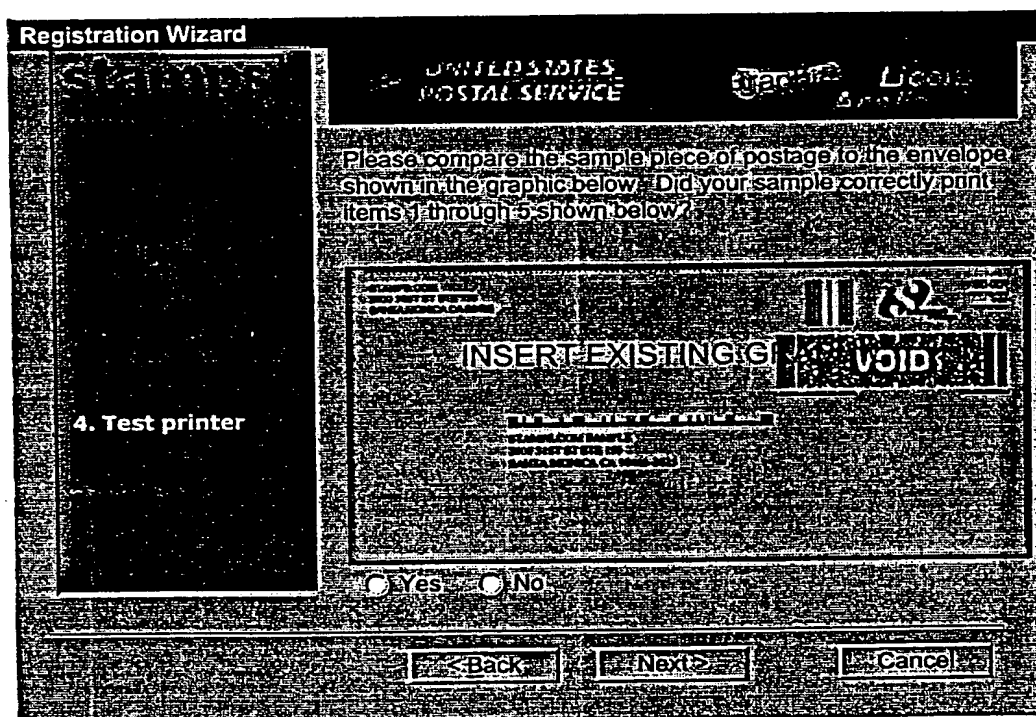
FIG. 11D

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Printer #3
Insert
Envelope

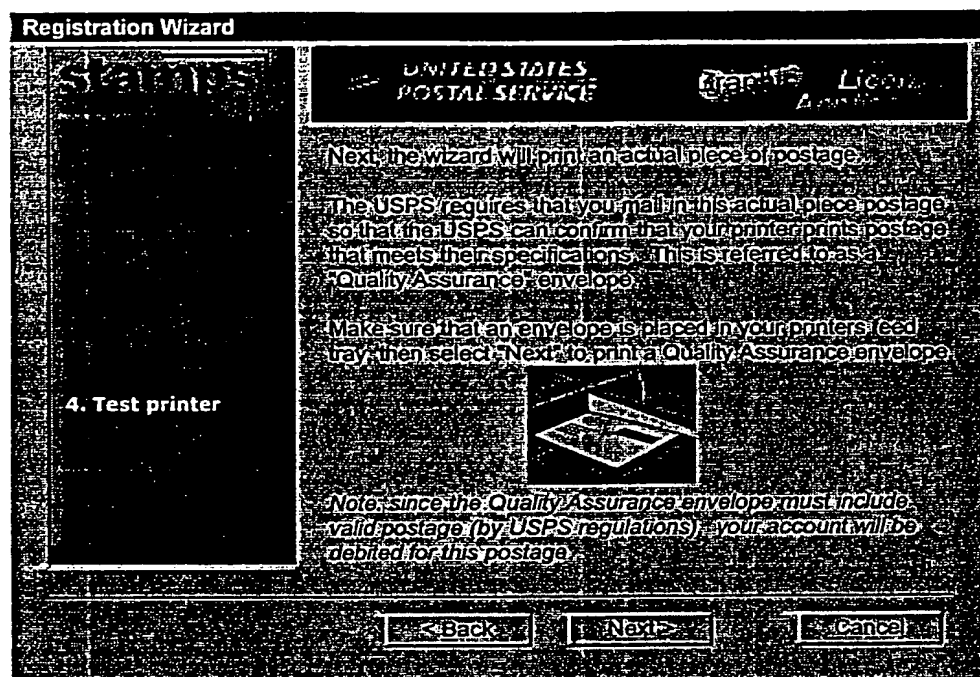
FIG. 11E



Printer #4
Compare
Sample

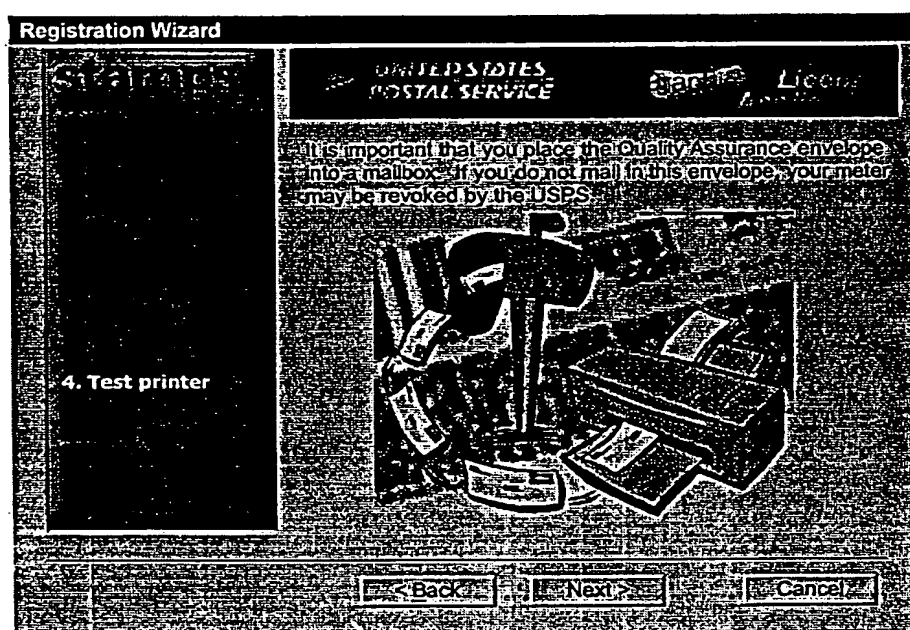
FIG. 11F

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Printer #5
Print QA env

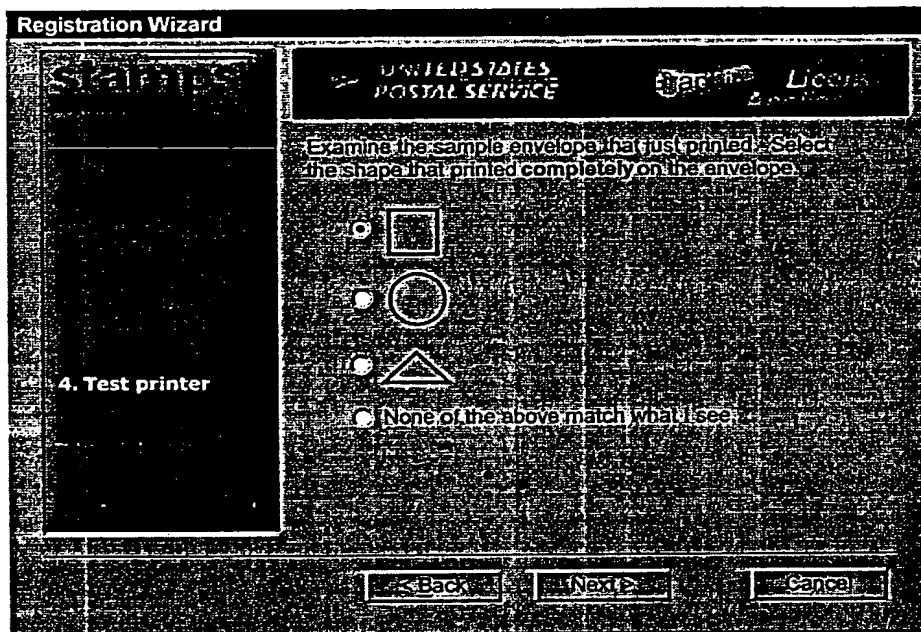
FIG. 11G



Printer #6
Mail QA env

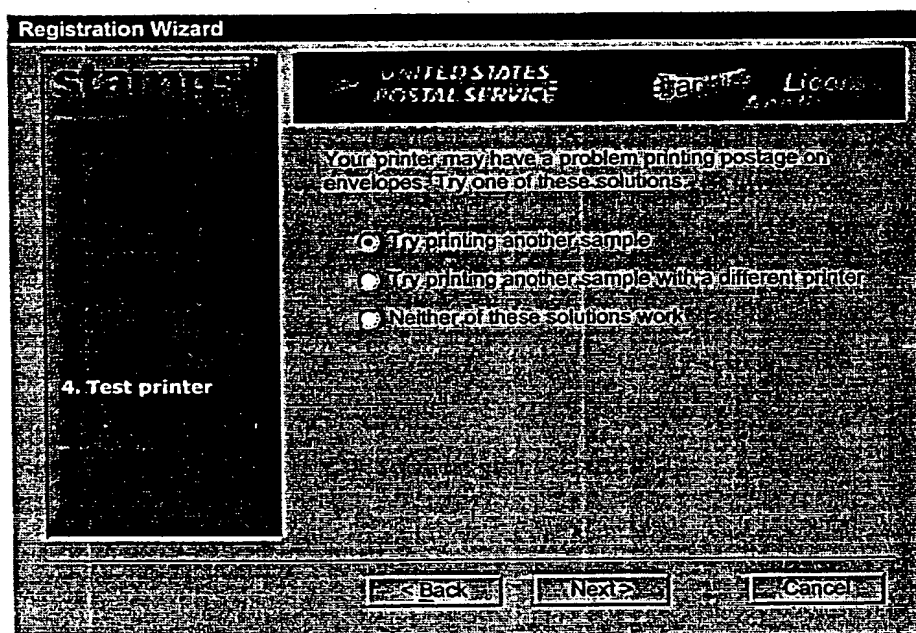
FIG. 11H

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Printer #7
What printed
onto env?

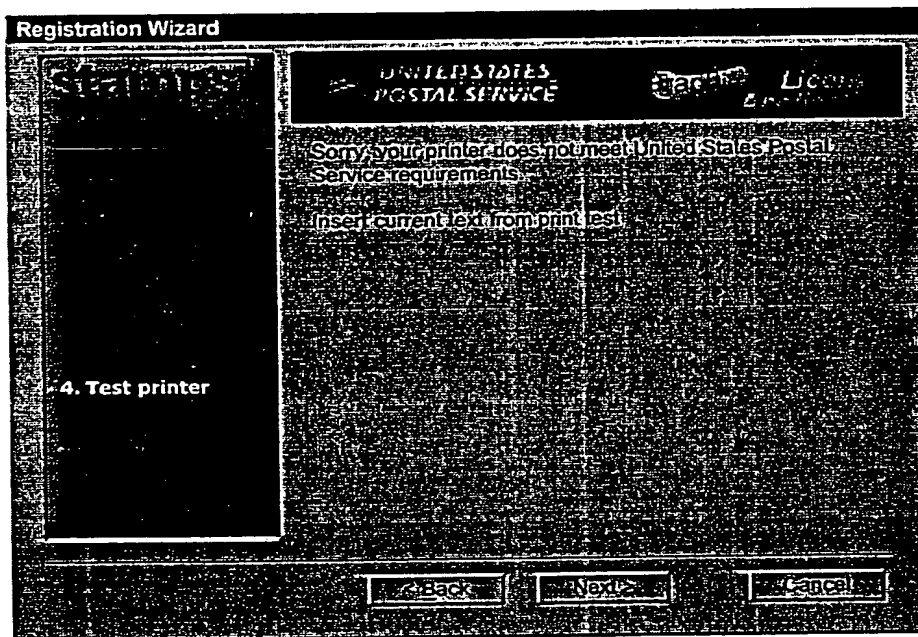
FIG. 11I



Printer #8
Troubleshoot
options

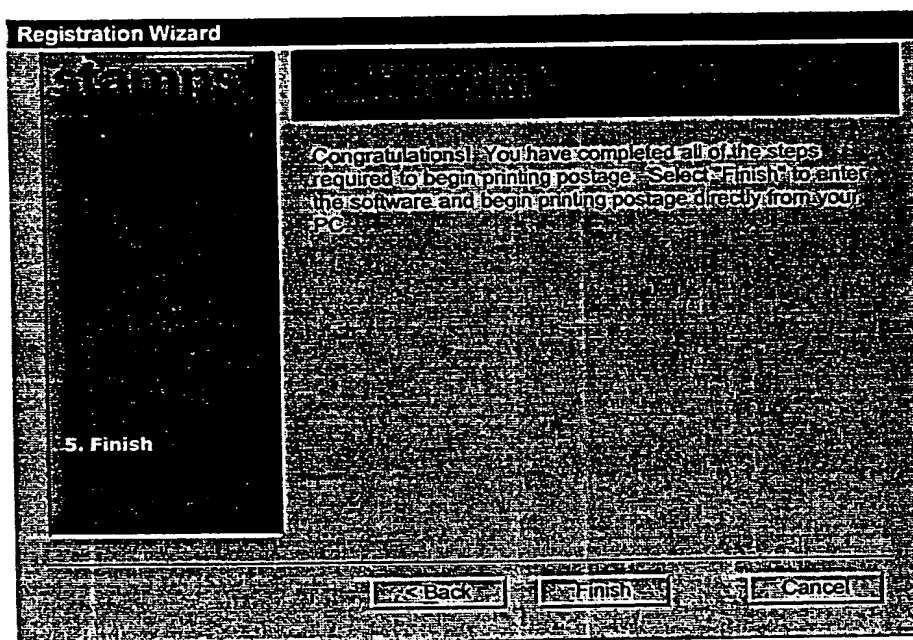
FIG. 11J

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Printer #9
Sorry, no
env. printing

FIG. 11K



Finish #1
Congrats

FIG. 11L

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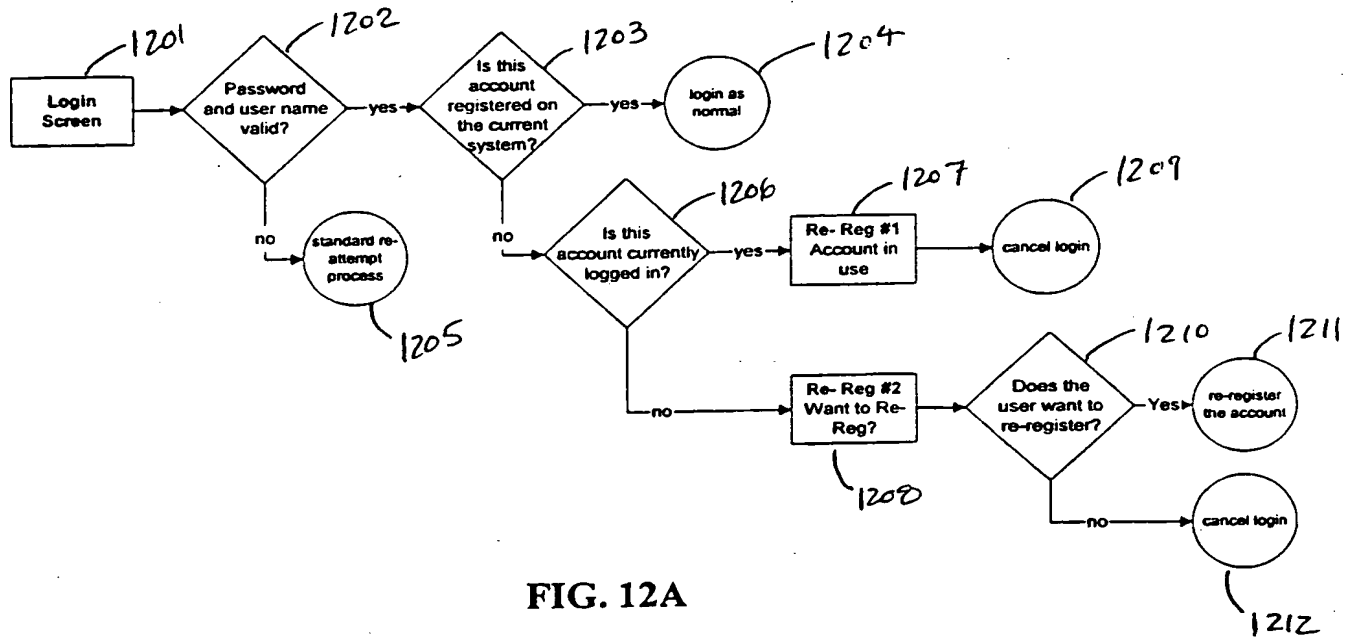


FIG. 12A

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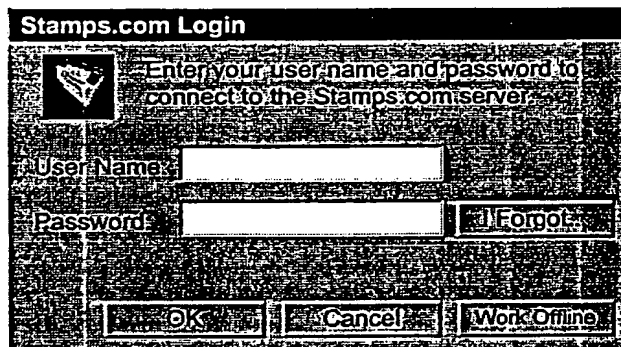
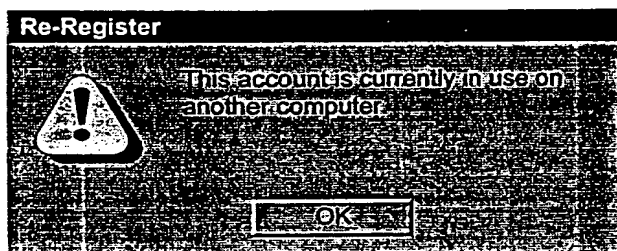
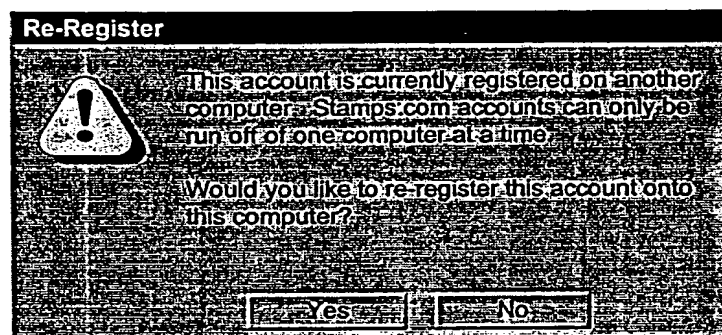


FIG. 12B



Re-Reg #1
Account in
use

FIG. 12C



Re-Reg #2
Want to
Re-reg?

FIG. 12D

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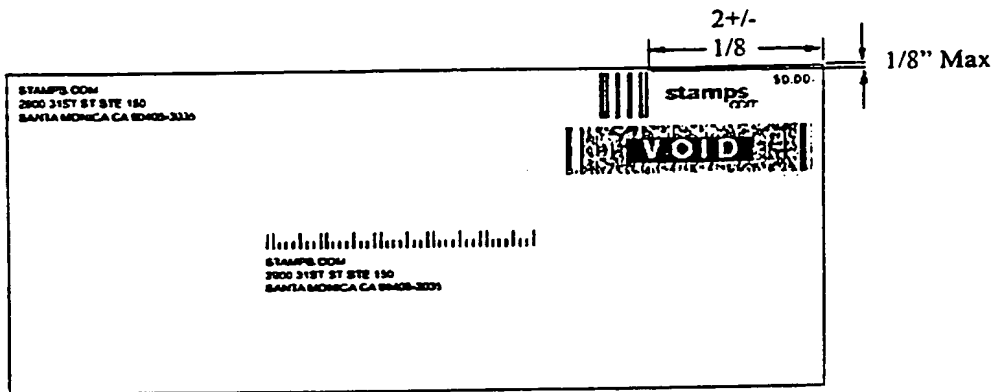


FIG. 13A

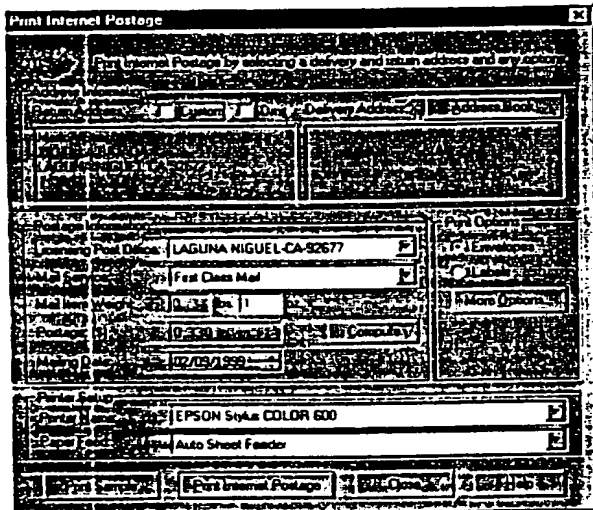


FIG. 13B

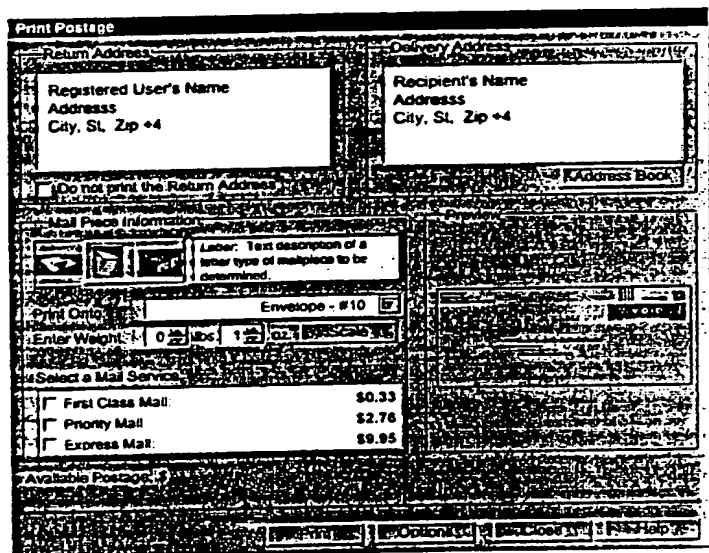


FIG. 13C

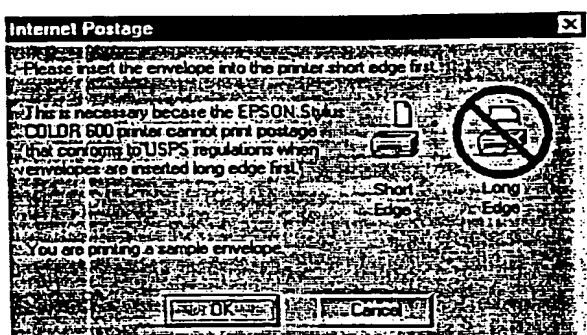


FIG. 13D

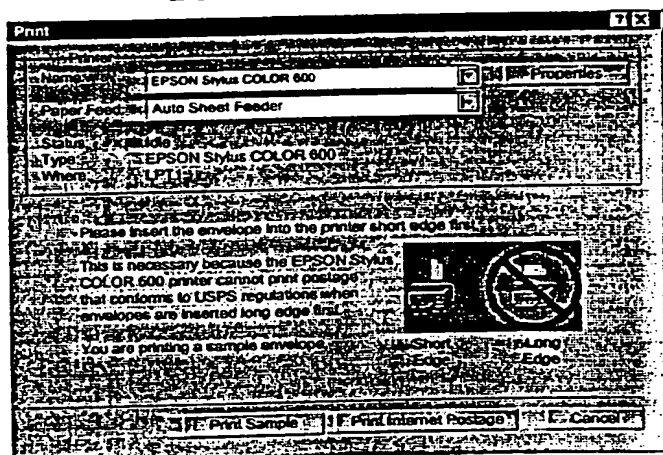


FIG. 13E

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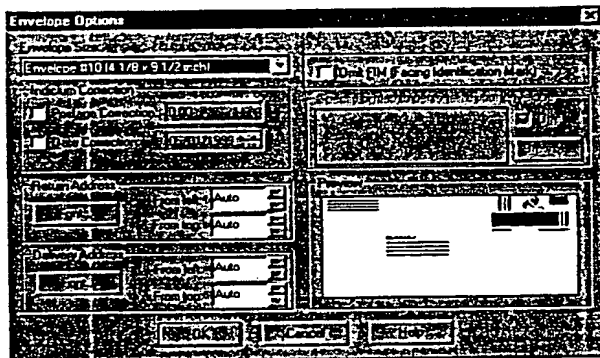


FIG. 13F

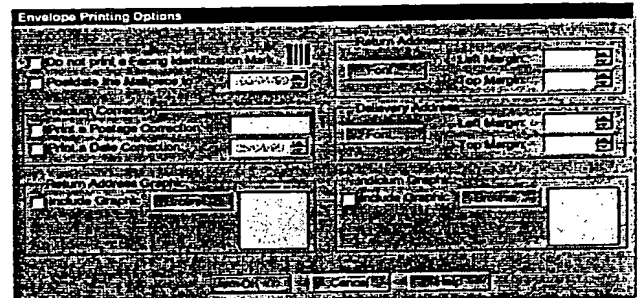


FIG. 13G

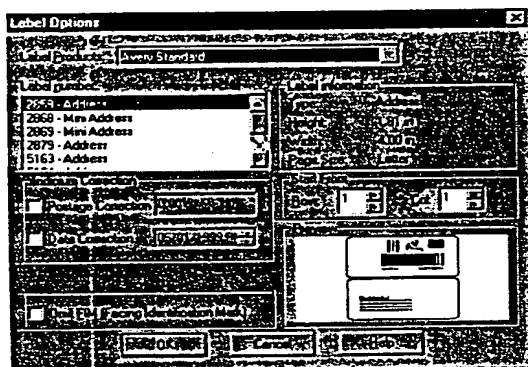


FIG. 13H

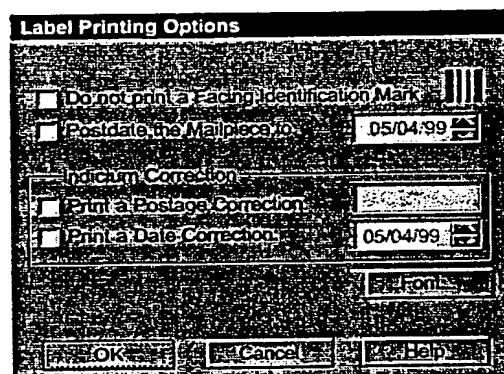


FIG. 13I

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Print Postage

Return Address	Delivery Address
Registered User's Name Address City, St, Zip +4	Recipient's Name Address City, St, Zip +4
<input type="checkbox"/> Do not print the Return Address	<input type="button" value="Address Book"/>

Mail Piece Information

☐ Letter: Text description of a letter type of mailpiece to be determined.

Print On: ☐

Enter Weight: lbs oz

Select a Mail Service:

<input checked="" type="checkbox"/> First Class Mail:	\$0.33
Priority Mail:	\$2.76
Express Mail:	\$9.95

Available Postage: \$

Preview

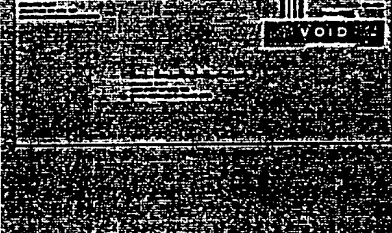


FIG. 13J

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Print Postage

Return Address	Delivery Address
Registered User's Name	Recipient's Name \$4.73
Address	Recipient's Name \$4.89
City, St, Zip +4	Recipient's Name \$5.09
	Recipient's Name \$5.31
	Recipient's Name \$5.31

☐ Do not print the Return Address **Address Book**

Mail Piece Information

☐ Registered Mail ☐ Registered Mail Restricted ☐ Registered Mail Signature ☐ Registered Mail Signature Restricted

Letter: Text description of a letter type of mailpiece to be determined.

Print On: ☐ Avery # 5643 ☒

Enter Weight: lbs. oz.

Select a Mail Service:

First Class Mail:	\$1.12
Priority Mail:	\$4.73 to \$5.31
Express Mail:	\$13.25 to \$21.98

Available Postage: 5

Cost of Mailing: to recipients @ \$1.12 = \$5.60

FIG. 13K

Print

Printer:

Name:

Paper Feed:

Status: Idle

Type: EPSON Stylus COLOR 600

Where: LPT1

Please insert the envelope into the printer short edge first.

This is necessary because the EPSON Stylus COLOR 600 printer cannot print postage that conforms to USPS regulations when envelopes are inserted long edge first.


You are printing a sample envelope.


☒ Short Edge ☐ Long Edge

FIG. 13L


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Envelope Printing Options

☐ Do not print a Facing Identification Mark 



☐ Postdate the Mailpiece to: 05/04/99 

Indicium Correction


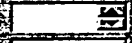

☐ Print a Postage Correction: 

☐ Print a Date Correction: 05/04/99 




Return Address Graphic

☐ Include Graphic:  



Return Address

Font:  Left Margin: 
Top Margin: 

Delivery Address

Font:  Left Margin: 
Top Margin: 

Indicium Graphic

☐ Include Graphic:  






  


FIG. 13M


Label Printing Options

☐ Do not print a Facing Identification Mark 



☐ Postdate the Mailpiece to: 05/04/99 


Indicium Correction

☐ Print a Postage Correction: 

☐ Print a Date Correction: 05/04/99 

Indicium Graphic

☐ Include Graphic:  

Font: 




  

FIG. 13N

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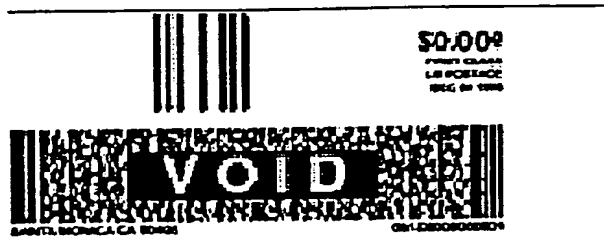
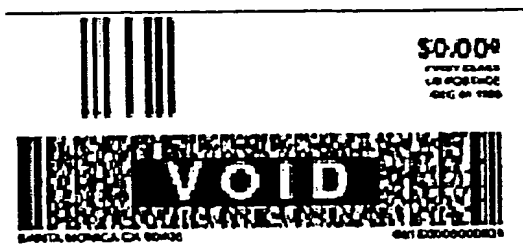


FIG. 14A

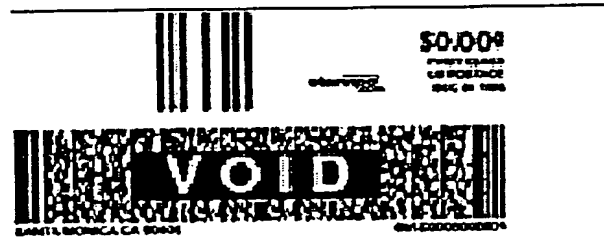


FIG. 14B

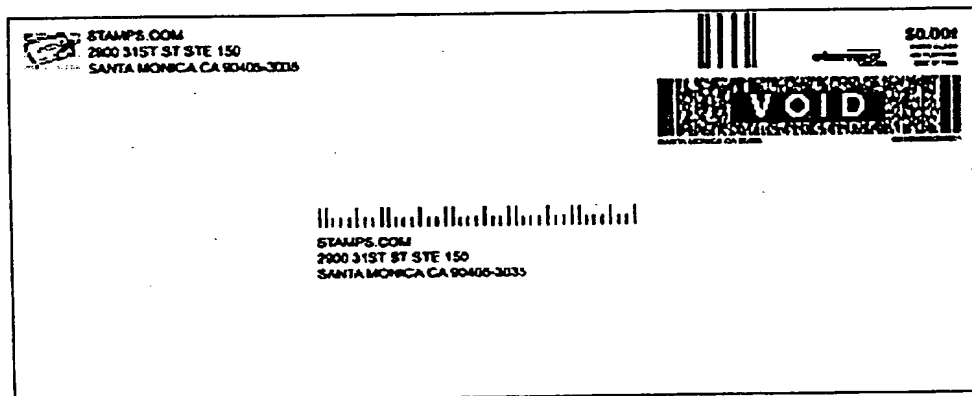


FIG. 15A

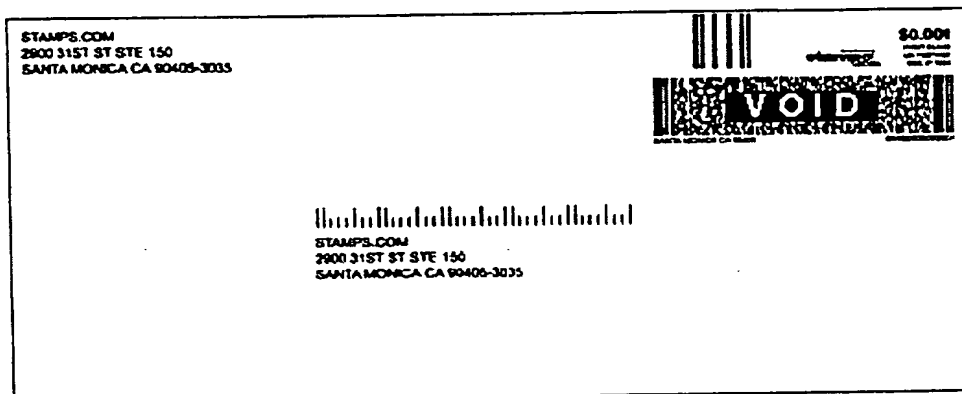



FIG. 15B


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Envelope Printing Options

☐ Do not print a Facing Identification Mark 


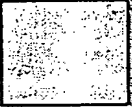
☐ Postdate the Mailpiece to: 05/04/99

Indicum Correction




☐ Print a Postage Correction: 

☐ Print a Date Correction: 05/04/99




Return Address Graphic

☐ Include Graphic:  



Return Address

 Left Margin: 
Top Margin: 

Delivery Address

 Left Margin: 
Top Margin: 

Indicum Graphics

☐ Include Graphic:  





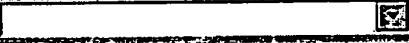


  

FIG. 15C

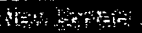

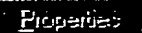
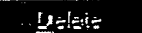
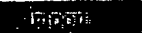
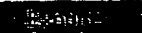
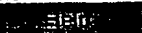
Address Book

Select an Address Book: 

Select a database or file:  

Search for: 

SS NAME	DIS NAME	Company
Sample Group		
Stier	Mark	STAMPS.COM
von Kaenel	Tim	STAMPS.COM




FIG. 16A

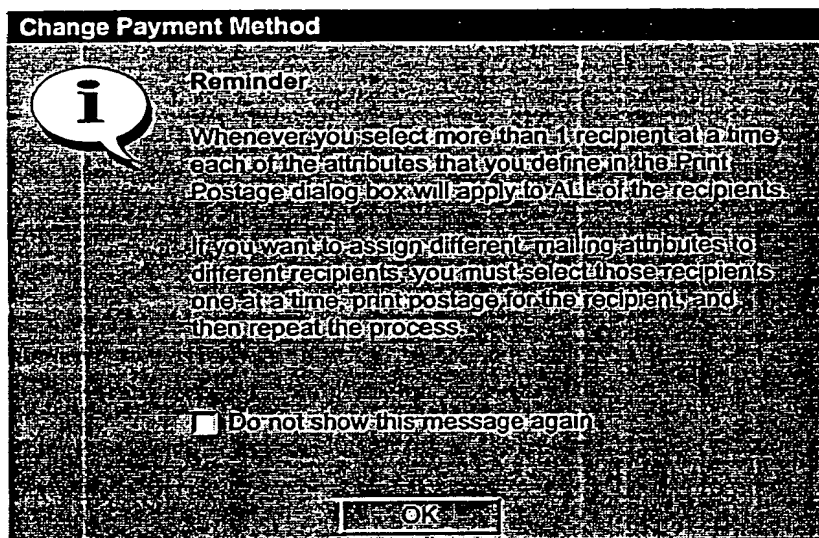


FIG. 16B

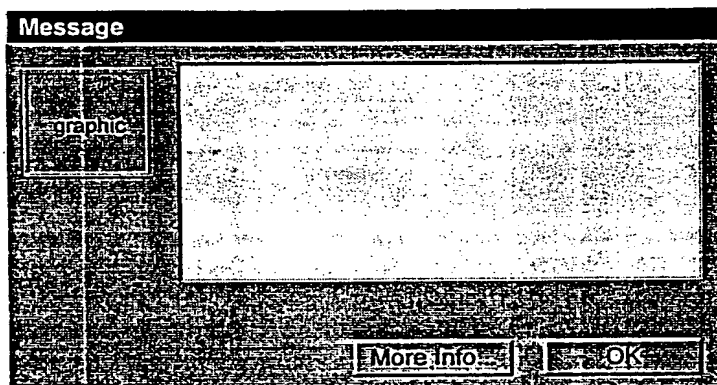


FIG. 17A

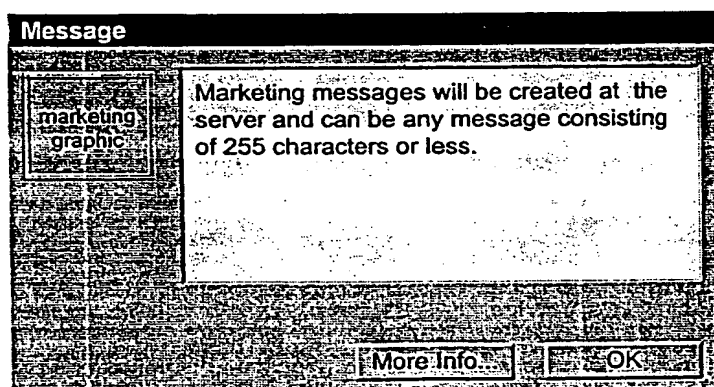


FIG. 17B

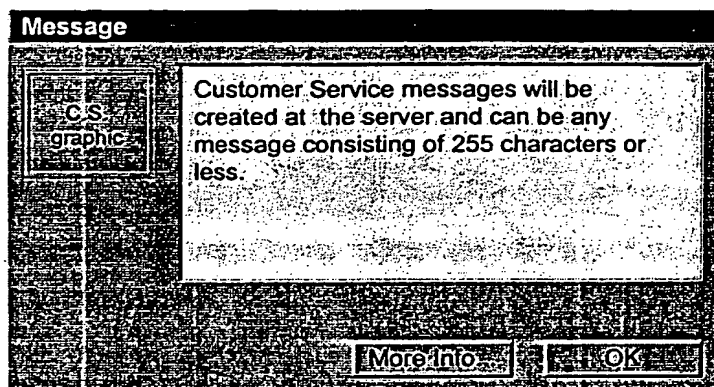


FIG. 17C

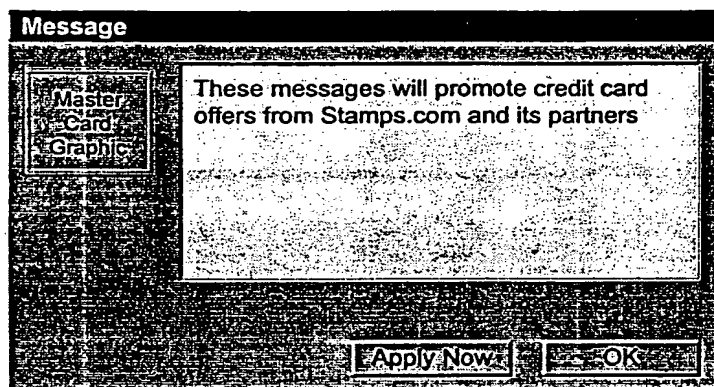


FIG. 17D

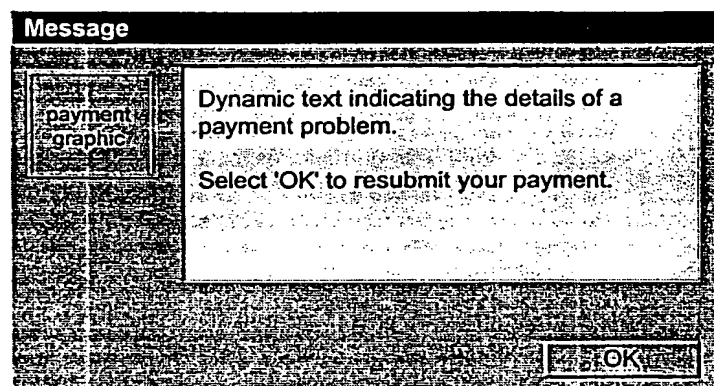


FIG. 17E

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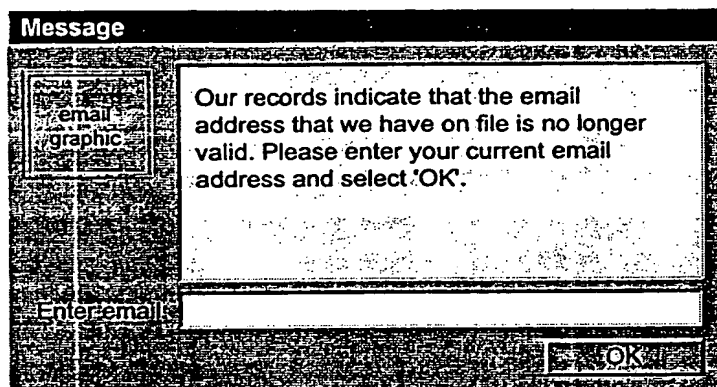


FIG. 17F

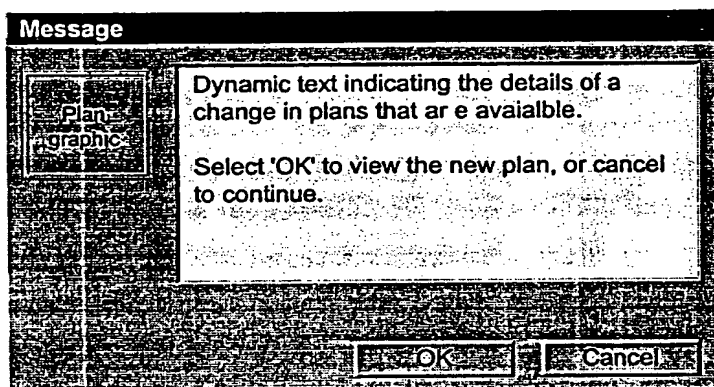


FIG. 17G

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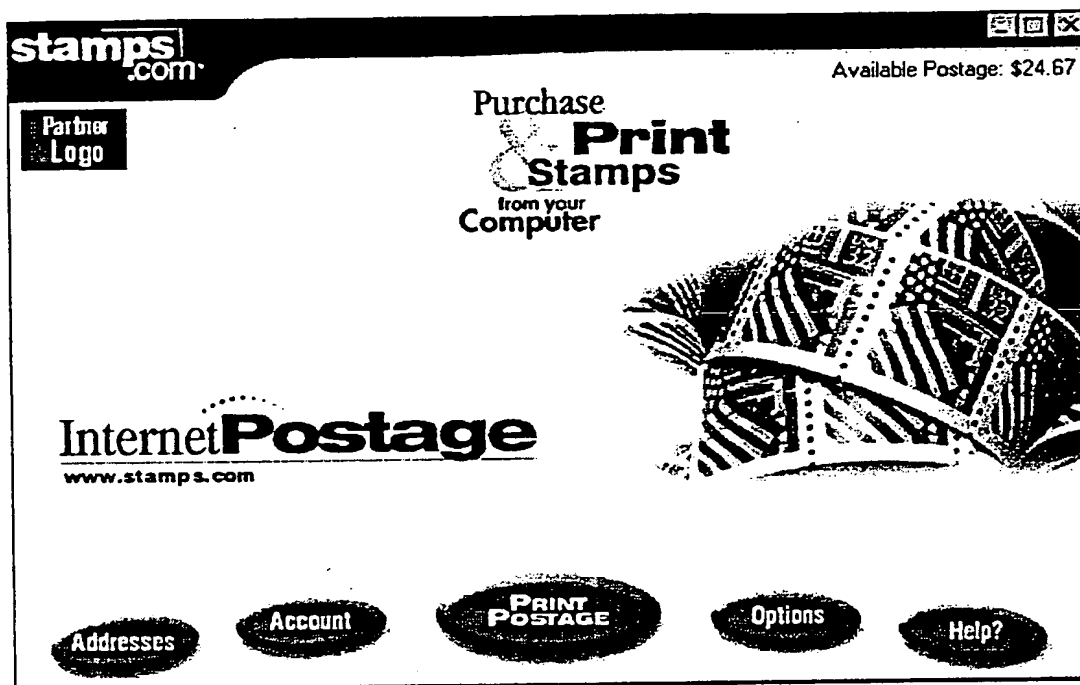


FIG. 18

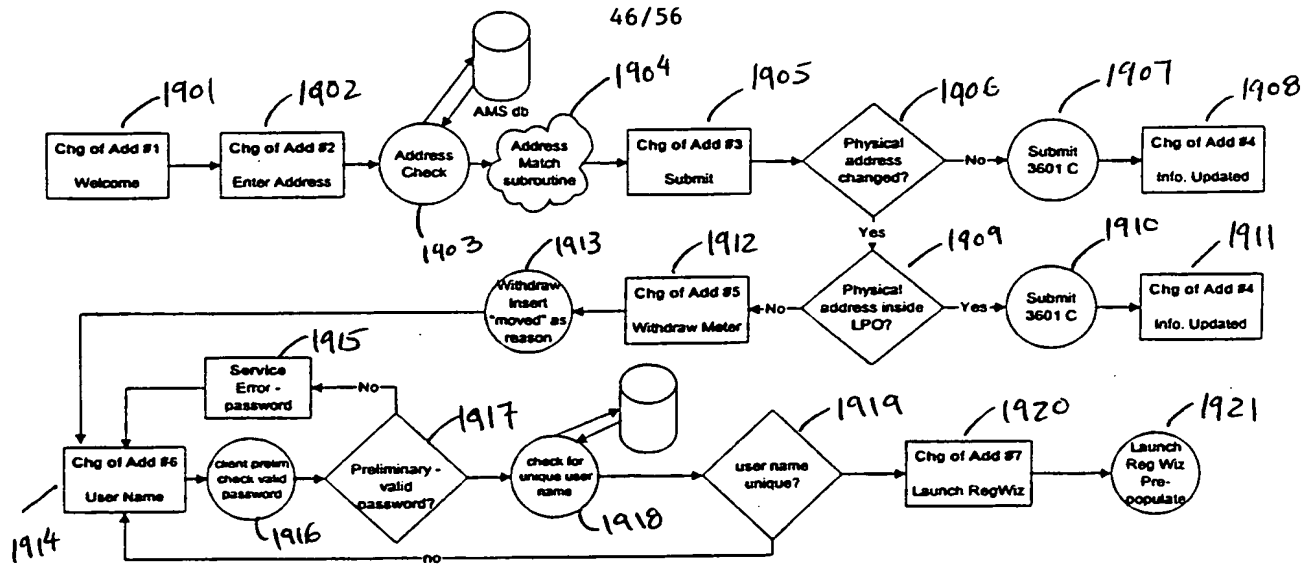


FIG. 19A

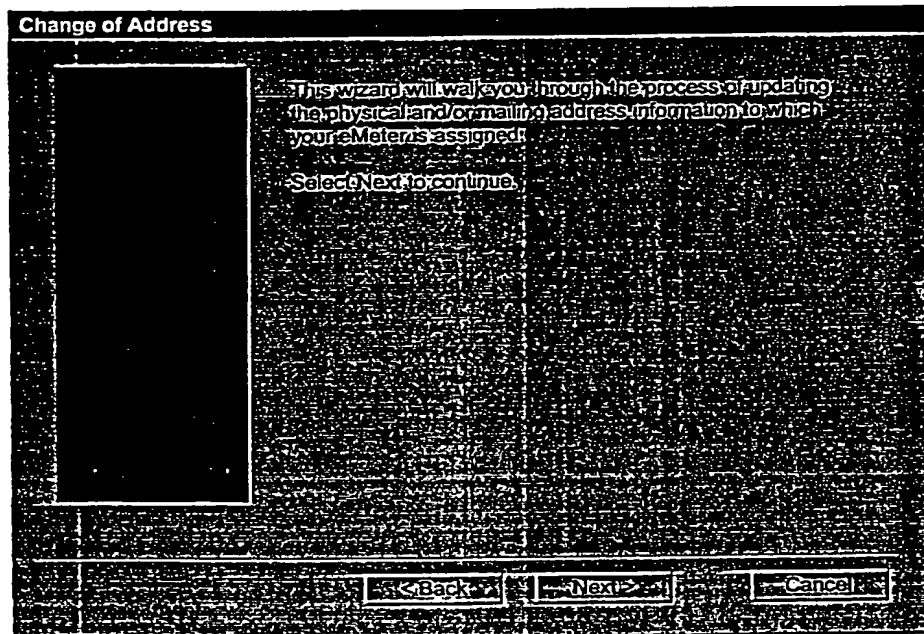
Chg of Add #1
Welcome

FIG. 19B

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Change of Address

Please enter any changes to either your physical or mailing address.

Physical address (where this computer is located)

Address: 259 Granada Avenue
City: Long Beach
State: CA ☒ Zip: 90803

Mailing address (where you receive mail)

☐ Use physical address

Address:
City:
State: ☒ Zip:

Chg of Add #2
Enter Address

FIG. 19C

Change of Address

Before submitting the updated information to the USPS, please review the answers that you provided and verify their accuracy.

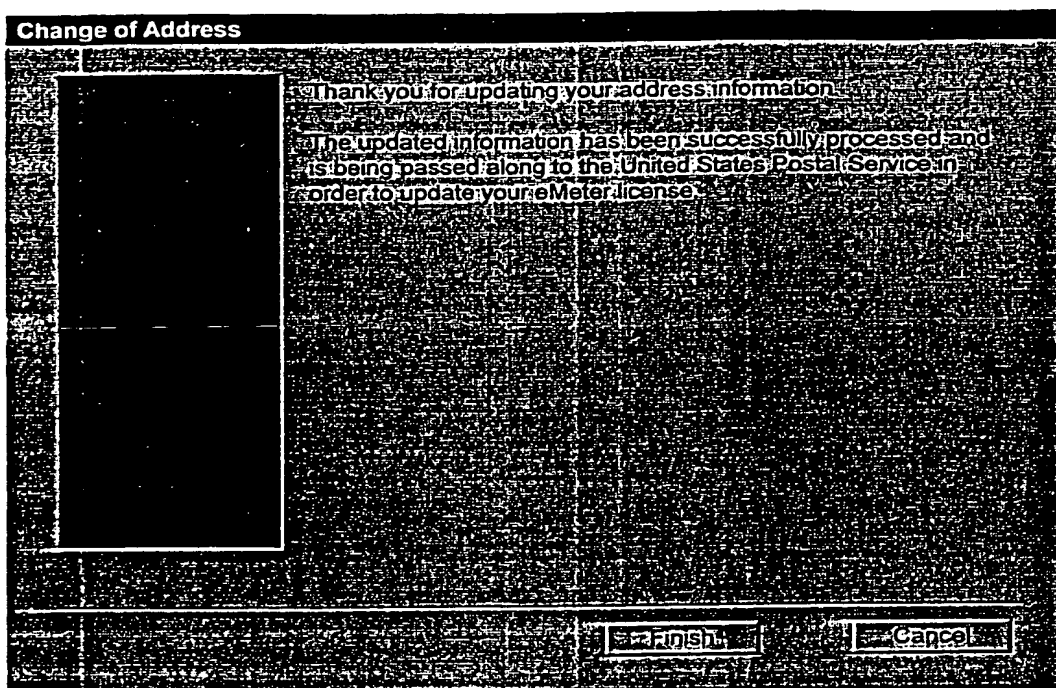
Applicant's Name: mark caslon	<input type="button" value="Up"/>
Physical Address:	
28341 LA BAJADA	
LAGUNA NIGUEL CA 92677-057	
Mailing Address:	
28341 LA BAJADA	
LAGUNA NIGUEL CA 92677-057	<input type="button" value="Down"/>

☐ I verify that the information shown is truthful and accurate.

Chg of Add #3
Submit

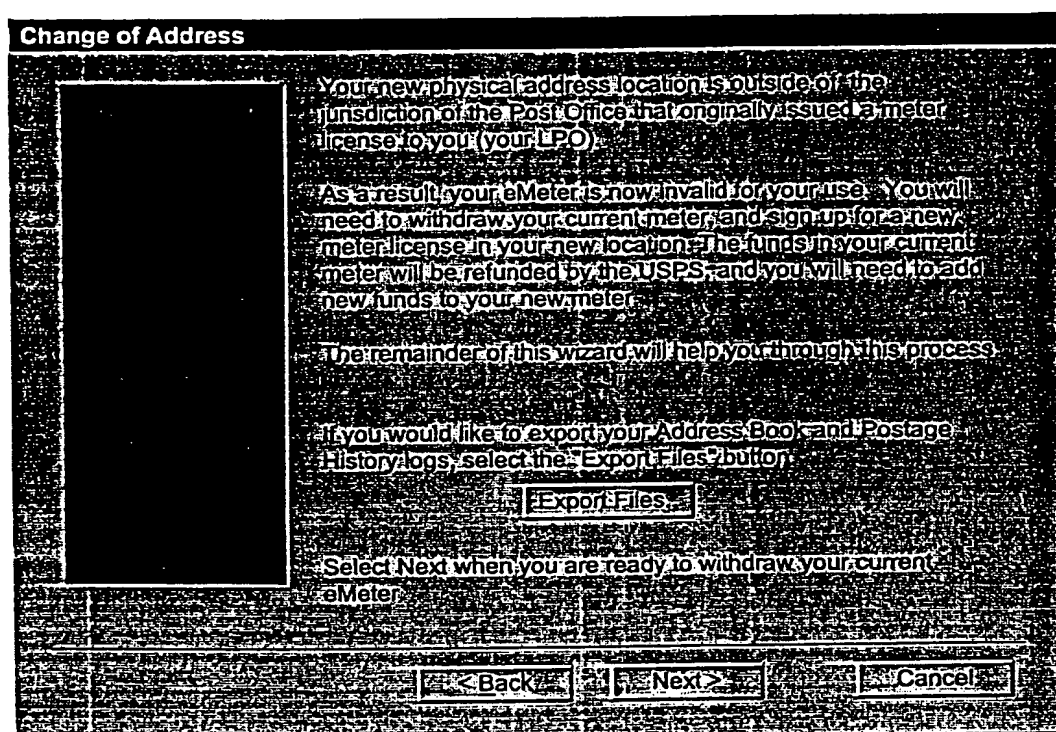
FIG. 19D

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Chg of Add #4
Info Updated

FIG. 19E



Chg of Add #5
Withdraw Meter

FIG. 19F

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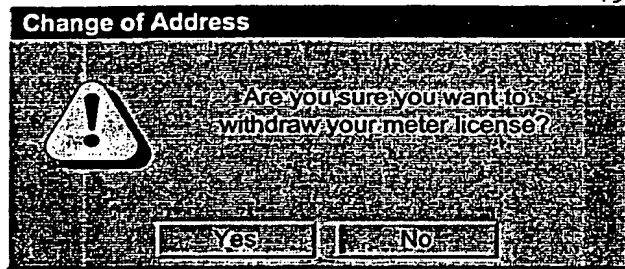
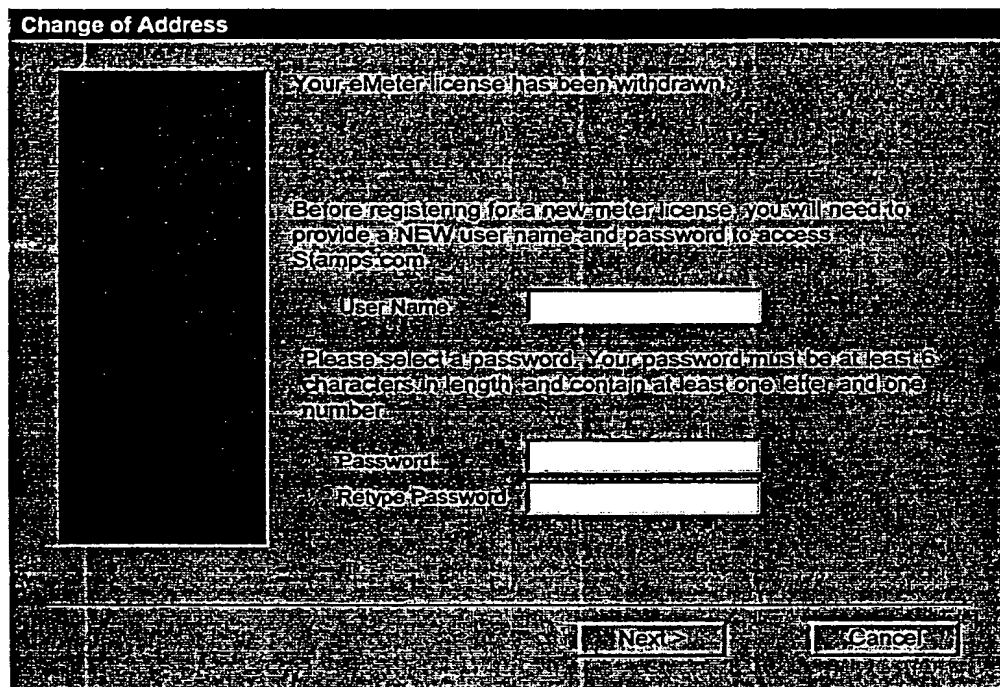
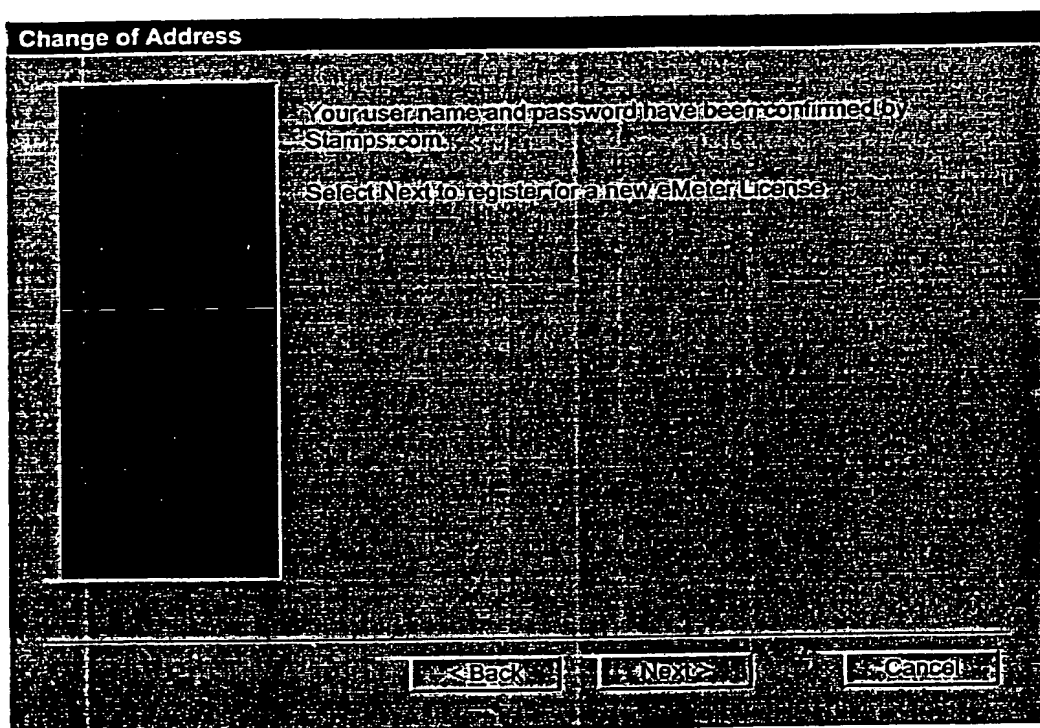


FIG. 19G



Chg of Add #6
User Name

FIG. 19H



Chg of Add #7
Launch Reg
Wizard

FIG. 19I

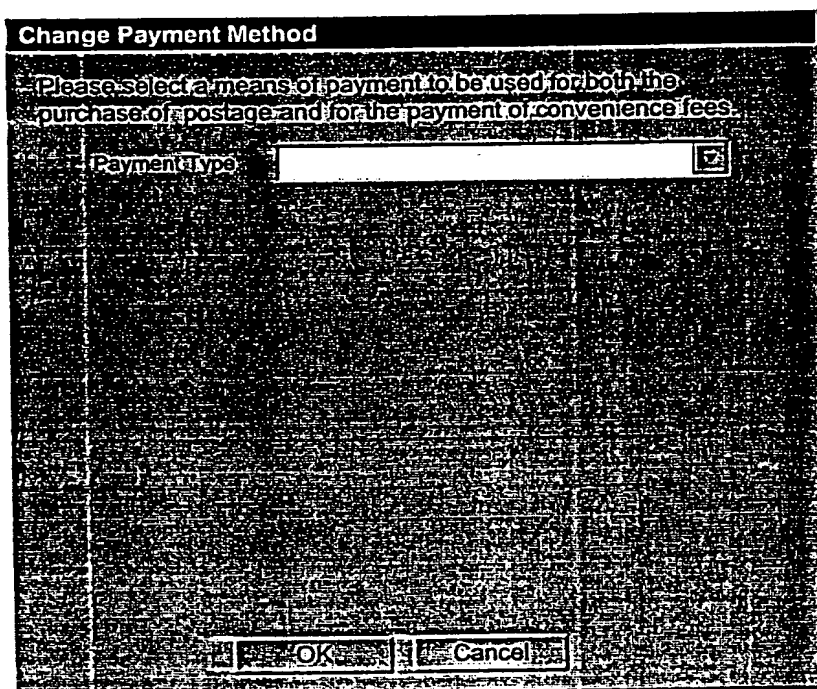


FIG. 20A

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Change Payment Method

Please select a means of payment to be used for both the purchase of postage and for the payment of convenience fees.

Payment type: ☒

Cardholder Name:

Card #:

Exp. Date:

Please provide your billing address for this account:

☐ Use Mailing address

☒ Zip:

FIG. 20B

Change Payment Method

Please select a means of payment to be used for both the purchase of postage and for the payment of convenience fees.

Payment type: ☒

Name on Acct:

ABA/Routing:

Account #:

Bank Name:

Account type: ☐ Checking ☐ Savings

FIG. 20C

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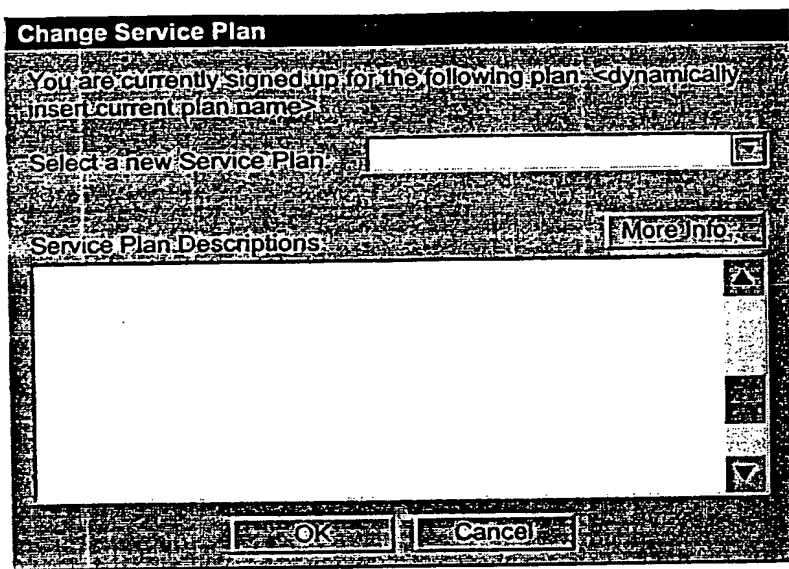


FIG. 21A

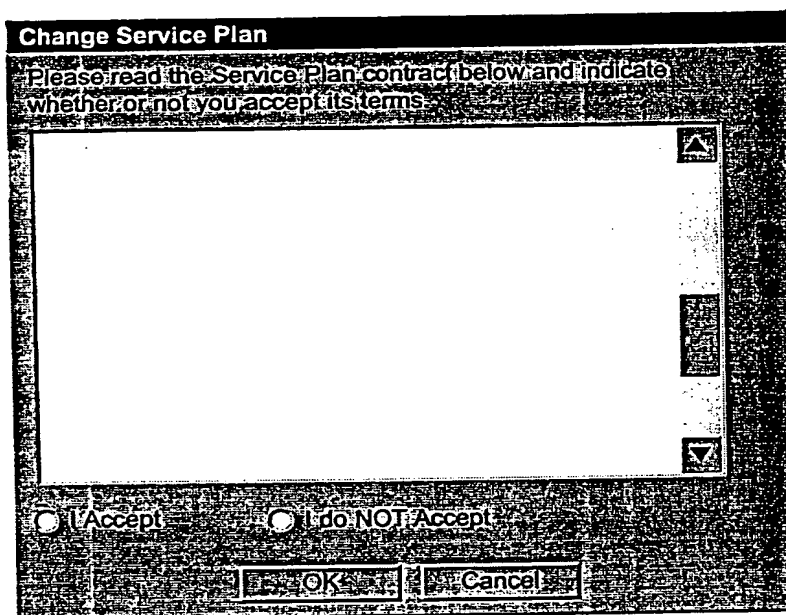


FIG. 21B

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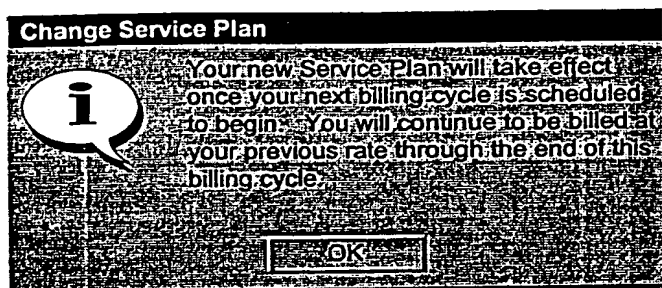


FIG. 21C

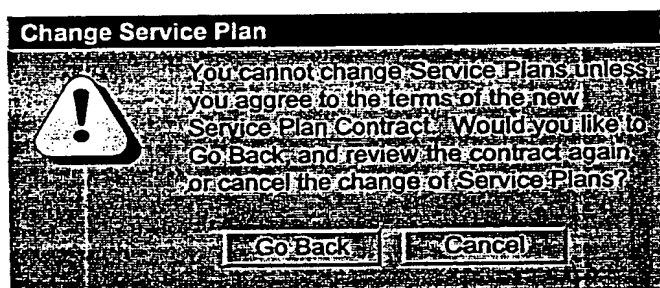


FIG. 21D

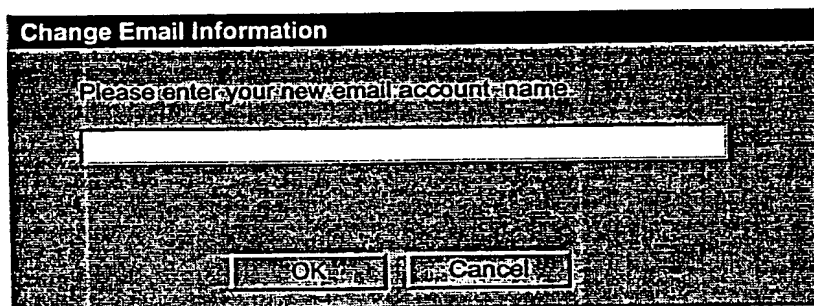


FIG. 21E

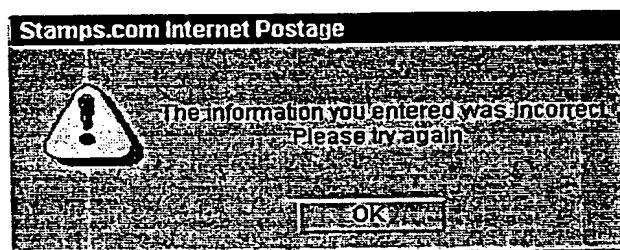


FIG. 22A

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FIG. 22B

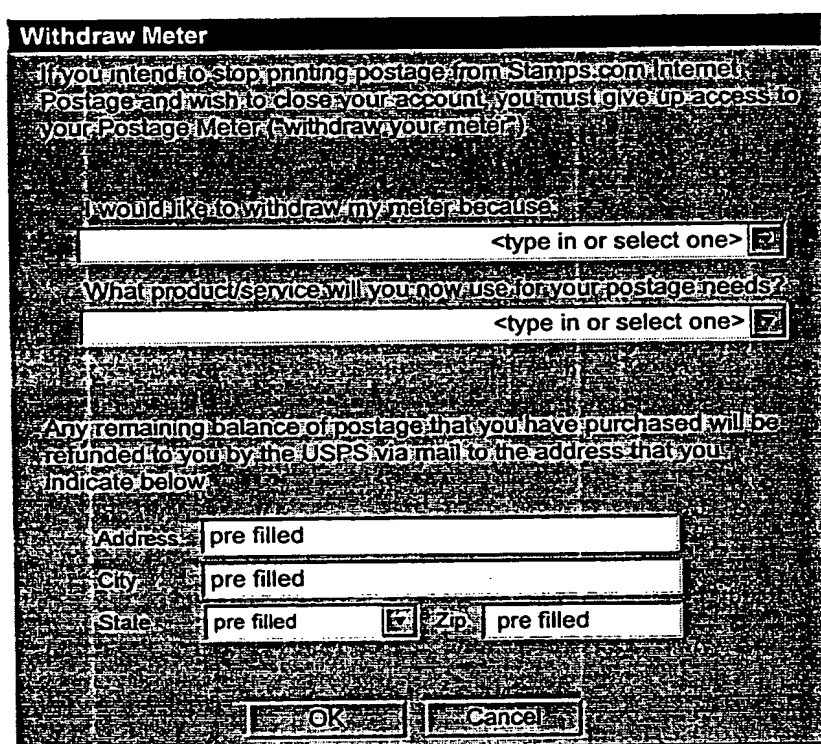
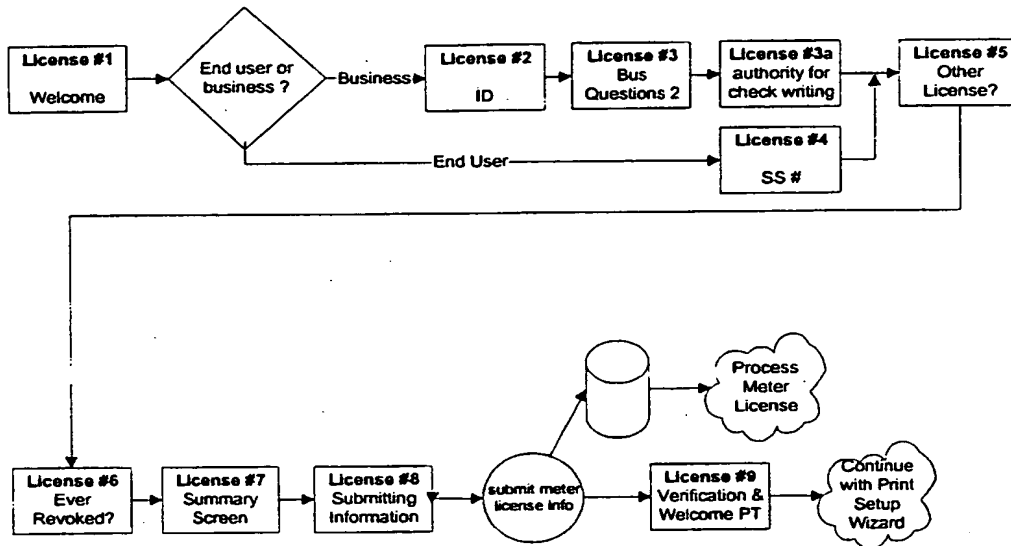
A screenshot of a 'Withdraw Meter' dialog box. The text inside reads: 'If you intend to stop printing postage from Stamps.com Internet Postage and wish to close your account, you must give up access to your Postage Meter (withdraw your meter.)'. Below this is a text input field with the placeholder '<type in or select one>'. Then, another question: 'What product/service will you now use for your postage needs?' followed by another text input field with the placeholder '<type in or select one>'. Below that, a paragraph: 'Any remaining balance of postage that you have purchased will be refunded to you by the USPS via mail to the address that you indicate below:'. This is followed by three input fields: 'Address: pre filled', 'City: pre filled', and 'State: pre filled' with a dropdown arrow, and 'Zip: pre filled'. At the bottom are 'OK' and 'Cancel' buttons.

FIG. 23

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Registration Wizard component**FIG. 24**

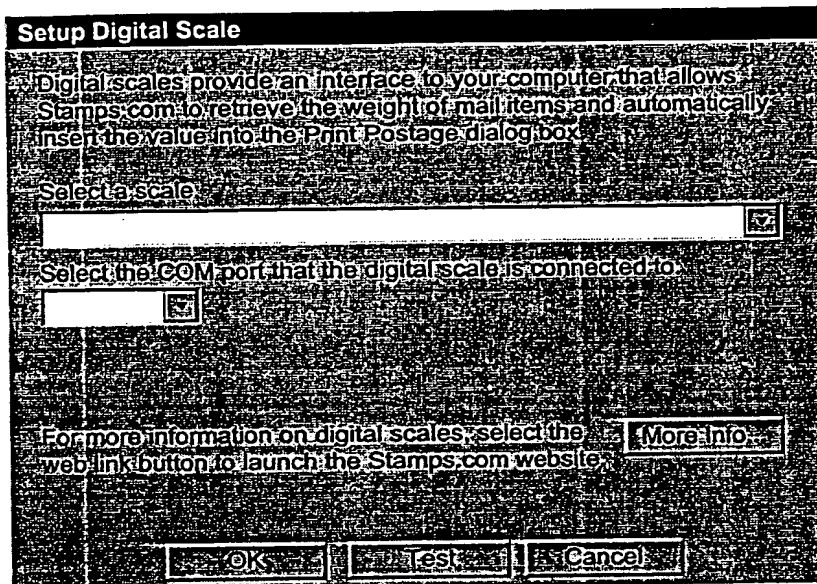


FIG. 25A

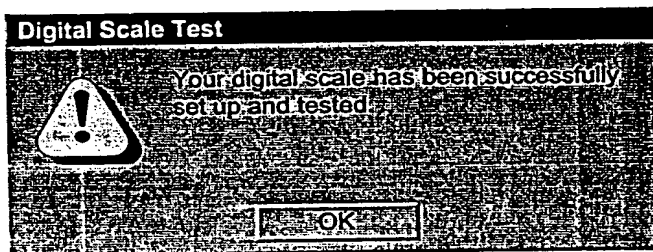


FIG. 25B

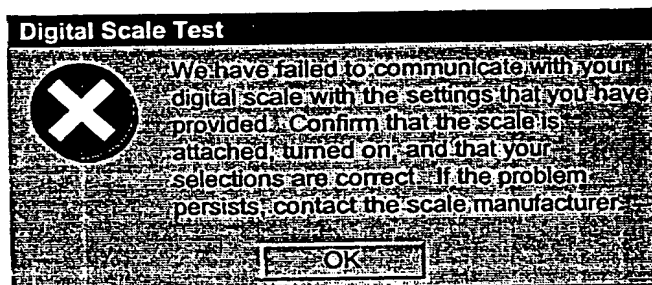


FIG. 25C

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